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# Living with Living History: The Impact of Old Salem Museums and Gardens on the Quality of Life in Winston-Salem, North Carolina

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# Living with Living History: The Impact of Old Salem Museums and Gardens on the Quality of Life in Winston-Salem, North Carolina

## **Abstract**

History museums serve an important role in most communities throughout the United States as repositories of heritage and educational institutions. However, many museums neglect to consider the impact of the services they provide, especially in a holistic manner. Contemporary museum management demands better self-assessment tool than those currently in vogue. As museums struggle to survive in the twenty-first century, museum impact analysis is imperative to demonstrate their value to the communities they serve. This thesis tests the suitability of quality of life metrics for holistic evaluation of museum impacts. To do so, a pilot study was conducted at Old Salem Museums and Gardens (OSMG), an open-air living history museum located in Winston-Salem, North Carolina. OSMG demonstrates the adaptability of quality of life methods to evaluate the intricacies of the site and museum contributions to citizen well-being. Through this analysis of education, community, economic and physical character indicators, OSMG is informed to make more sustainable decisions and better demonstrate their value to the community of Winston-Salem. This thesis provides museum practitioners with an objective quality of life framework to measure museum impacts on the communities in which they are located.

## **Keywords**

quality of life, museum impact analysis, old salem museums and gardens, open-air living history museum, holistic evaluation

## **Disciplines**

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LIVING WITH LIVING HISTORY: THE IMPACT OF OLD SALEM MUSEUMS AND GARDENS  
ON THE QUALITY OF LIFE IN WINSTON-SALEM, NORTH CAROLINA

Briana G Paxton

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## Chapter One: Introduction

Museums in the twenty-first century are faced with the challenge of sustaining engaging operations despite diminishing budgets and dwindling public support. Open-air living history museums are the most complex and expensive of historic sites to sustain as a result of their expansive grounds, numerous buildings, and large staffs. The heritage field recognizes these museums as some of the most professional and influential history museums in the United States.<sup>1</sup> Assessing the impacts of a museum on its local community is a crucial step in understanding the accomplishments and struggles of these museums. Open-air living history museums influence both the heritage and the identity of the townspeople, as a result sometimes attracting new residents who desire to live in a historic area. These museums inspire children to take a deeper look at history and allow visitors, local and from around the world, to make meaningful connections with America's past. In addition, open-air living history museums provide employment, and influence economic development policies. As institutions, they carry political clout in the local government and serve as a brand name for the region. Interestingly, however open-air living history museums in the United States are mis-understood and understudied, both from inside the field and out. The towns and the museums in which they are located often operate blindly, without streamlined cooperation between the town and its historic site. The situation creates two independently operating entities, both vying for scarce financial resources. The lack of communication between open-air living history museums and the surrounding community leads to policies that hinder sustainable operations for these museums. The goal of this study is to propose a suitable method to assess the impact of open-air living history museums on the quality of life in the communities in which they are located. It can serve to provide open-air living history museums with an objective self-assessment method that can enable museum operators to make informed decisions leading to long-term sustainability and improved community well-being.

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<sup>1</sup> Anders Greenspan, *Creating Colonial Williamsburg: The Restoration of Virginia's Eighteenth-Century Capital*. 2nd ed. (UNC Press Books, 2009) 1, 128, 166, and Warren Leon, and Roy Rosenzweig, eds. *History Museums in the United States: A Critical Assessment*. (Chicago, IL: University of Chicago Press, 1989) 87.

This thesis creates a multi-methodological quality of life framework with the objective of measuring museum impact. A review of the literature shows that the American museum sector lacks a holistic self-assessment of museum impact. As stated in one such study, “cultural institutions themselves are often myopic about commissioning impact evaluations, and use them to assess the effectiveness of their own management systems rather than finding out whether they made a difference to their audience, or contributed in some way to cultural change.”<sup>2</sup> While measures have been formulated to help assess individual aspects of museums such as economic impact, these measures do not provide an accurate indication of how the museum influences the local community as a whole. Holistic self-analysis is vital, especially when non-profit museums are struggling to achieve their funding goals in the face of dwindling visitation.

To gain the continued support of its local community, open-air living history museums need an objective annual holistic assessment to ensure the benefits of the museum are discussed internally and externally. While some museum evaluation occurs in the United States, the methods are not holistic. For example, the focus of the Museum Assessment Program provided by the American Alliance of Museums is organizational structure of the museum, not its impact on a community. Likewise, the American Association of State and Local History’s visitor surveys do not examine community values and measure experiences other than museum impact. Other disciplines demonstrate the utility of holistic quality of life studies to assess community-wide impact.<sup>3</sup> Cultural institutions in the United Kingdom and Australia use quality of life indicator frameworks and similar methods to evaluate, but very few studies have tried these research techniques for museums in the United States.<sup>4</sup> This thesis evaluates the suitability of the quality of life methodology to gauge the overall contributions of museums to their local communities.

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2 Sara Selwood Associates, “Making a Difference: The Cultural Impact of Museums: An Essay for NMDC,” (July 2010), 14.

3 See the Global City Indicators Facility at <http://www.cityindicators.org/>.

4 See Christine Burton and Janette Griffin, “Investigating Social Impacts of Small Museums in Local Settings: Implications for Policy Making,” *ICCPR 2006: Fourth International Conference on Cultural Policy Research* (July 2006): 1–18 and Rhonda Phillips and Jay Stein. “An Indicator Framework for Linking Historic Preservation and Community Economic Development.” *Social Indicators Research* (2011). <http://www.springerlink.com/content/j3t4186157728877/>.

To demonstrate the effectiveness of the quality of life method for museum impacts, this thesis looks specifically at Old Salem Museums and Gardens (OSMG) in Winston-Salem, North Carolina as a pilot study(Appendix A1 and A2). Old Salem was established as an open-air museum in 1950 to interpret and preserve the historic town of Salem, a former theocratic village founded in the 1760s by a group of Protestant missionaries called Moravians. The museum was established through modern zoning, municipal planning, a dedicated community, and guidance from Colonial Williamsburg. Through museum planning process, the community opted for the living history model to teach visitors about the eighteenth-and-nineteenth century lives of the Moravian settlers transitioning to life in America. The site tells the story of immigration, innovation, religious reform, slavery and modernization in a society that lasted as a theocratic society until 1857. Today, the Town of Salem is a functioning neighborhood within the City of Winston-Salem with OSMG buildings situated next to privately-owned eighteenth-century restored houses, across the street from the modern day Home Moravian Church and Salem College. The distinctive make-up of the neighborhood and the strength of public-private partnerships keep the historic area intact.



Figure 1. Old Salem Logos for the Town, the Gardens, MESDA, and the Museum.



Despite its charm and prestige, visitation numbers in Old Salem have dwindled and the museum strives to stay relevant in the community. Furthermore, the Winston-Salem area is flush with history museums, including two others nearby also interpreting Moravian history. As OSMG reaches its 63rd year as a museum, the institution acknowledges the difficulty of meeting community needs while simultaneously preserving its reputation as an open-air living history museum. With a clearer grasp of its impact on the community, OSMG management can make smarter decisions with implications for long-term sustainability. OSMG's involvement in this project shows the open-minded attitude of the management and their desire to sustain Old Salem as a "third place" for generations to come in Winston-Salem.<sup>5</sup> This analysis of OSMG indicates what the museum provides, how it is valued by the community, and what ways it contributes to the overall well-being of citizens in Winston-Salem.

The investigation is organized as follows:

- Chapter Two is a literature review justifying the need for this thesis with the works presented together in themes. First, a history of open-air museums and critiques of living history is presented. Second, an overview of museum evaluation and its progression to measuring museum impacts follows. Finally, quality of life metrics are examined and the adaptation to the museum field discussed.
- Chapter Three presents the thesis methodology. This chapter explains the research interests, methods undertaken and quality of life indicator framework.
- Chapter Four serves as the pilot study on Old Salem Museums and Gardens. This chapter demonstrates the suitability of the quality of life framework and results of implementation.
- Chapter Five is the discussion of benefits and challenges of the quality of life framework, the OSMG pilot study, and implications for future adaptability.

This thesis will serve as a preliminary investigation of how to adapt quality of life metrics for use for museum evaluation. The quality of life framework will be made available to open-air living history museums in the United States for self-evaluation. Furthermore, this thesis is meant to serve as a wakeup call to open-air living history museums: the

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<sup>5</sup> Robert Putman, *Bowling Alone: The Collapse and Revival of American Community*, (Touchstone Books by Simon & Schuster, 2001). The author discusses the concept of a third place, which compliments the second place: work, and the first place: home, as a site for social and community engagement.

gap must be bridged between the goals and operations of museums and the needs of the communities in which they serve. Instead of expecting constituents to visit and contribute financially, museums must take the initiative to self-assess and prove their worth to the community. Only then, will open-air museums reach their true level of value and contribution to citizen well-being in the communities in which they are located.

## Chapter Two: Literature Review

Open-air living history museums are a critical part of the history museum field in the United States.<sup>6</sup> They compose some of the largest and most well-known museums in the country, yet remain under-studied. The lack of literature on open-air museum living history museums, especially works produced in the United States is not a secret, as researchers have noted this shortcoming for decades. Of the small amount of literature available, the most well-known pieces generally fall into two categories: 1) general histories of living history sites or 2) critics of inaccurate interpretations presented at historic sites. Additionally, literature on the subject of museum evaluation is equally deficient, although recent attempts to remedy this shortage are making headway. The fact that there is so little written on museum self-analysis or impact evaluation is attributed to a culture in the museum world that is unwilling to change from within.

This thesis discusses literature in three categories: open-air living history museums, museum evaluation and quality of life. The literature analyzed below provides a progressing story of how open-air museums came about and when the living history model of interpretation became standard in the United States. The array of museum evaluation literature demonstrates areas where museums are struggling and succeeding today. Finally, an assessment of quality of life metrics illustrates how these methodologies are used for other sectors and can be translated for the museum field.

### Open-air Museums and Living History

Currently, there exists no comprehensive list of open-air living history sites. In the United States, the Association of Living History, Farm and Agricultural Museums (ALHFAM) has thousands of sites on their membership list, but the list is not all encompassing. Likewise, the early history of the open-air museum movement is not well documented in scholarship. There is some discrepancy on the matter, but generally-known the earliest open-air museum was Skansen, a historic site in Sweden established in 1891.<sup>7</sup> The founding

<sup>6</sup> Greenspan, 1.

<sup>7</sup> Sten Rentzhog, *Open Air Museums: The History and Future of a Visionary Idea*, trans. Skans Victoria Airey (Carlssons Jamtli, 2007), 4.

establishment set the museum standard for the depiction of community life to the best extent known, restoring buildings to museum quality, and interpretive demonstration to educate visitors. In his overview of open air museums worldwide, Sten Rentzhog examined how the development and visions of living history museums expanded from Skansen, which served as a model of open-air museums in Europe. Rentzhog's 530 page book is the most comprehensive review of the open-air museum movement available today. In his United States analysis, "Outdoor Museums in America," Rentzhog applauds how Americans achieved outdoor museums of a new scale; museums of considerable size built with private funding. According to Rentzhog, by the 1960s and 70s open-air museums were an international phenomenon and a firmly established movement.<sup>8</sup>

The exchange of the open-air model from Europe to the United States in the early-twentieth century marked a critical point in the history of open-air museums. In his seminal *Time Machines: The World of Living History*, author Jay Anderson discussed how the American movement of open-air living history museums accelerated. Anderson described the correspondence between the Swedish museum and the Society for the Preservation of New England Antiquities (SPNEA) about the open-air museum model. The author noted that in 1919 W.S. Appleton of SPNEA spoke highly of the "realistic recreation" of the past in Sweden and how it would be a useful model for American museums. According to the author, Henry Ford saw the educational potential of the "living museum" after Ford visited with SPNEA in 1923 and subsequently Ford used this inspiration for his Greenfield Village in Deerfield, Michigan, in 1929.<sup>9</sup> Nearly simultaneously, J.D. Rockefeller Jr. and Reverend W.A.R. Goodwin undertook their master plan to restore the urban core of Williamsburg, Virginia using a similar model.<sup>10</sup> The master plan to recreate the built environment and reenact community life in the Colonial Capital in Virginia paved the way for other open-air museums to adopt the open-air living history model. Anderson stated clearly, "the impact of the Williamsburg experience with live interpretation on other American open-

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8 Rentzhog, 152.

9 Jay Anderson, *Time Machines: The World of Living History*, (Nashville, Tennessee: The American Association for State and Local History, 1984), 28.

10 Anderson, 28.

air museums taking shape during that period cannot be under-estimated.”<sup>11</sup> The Colonial Williamsburg model propagated, as many other open-air museums formed around that time sought to become a regional “living museum,” built on the proposition that the history of a region is significant, and its material culture should be collected, persevered, studied, and interpreted.<sup>12</sup> By the 1940s, open-air museums on the scale of Colonial Williamsburg became the gold standard for the “American way of history.”

Furthermore, Anderson’s work outlined the history of the movement between the 1930s and 1970s, where leaps and bounds were made in the field in professionalization, accuracy and popularity. The success of these “living museums” in the early-to-mid-twentieth-century was adopted by both the Smithsonian and the National Park Service and served as catalyst for foundation of the American Living History Farms and Agricultural Museums (ALHFAM). The ALHFAM originated as an organization to promote the live interpretation of American agricultural history. The ALHFAM and NPS adoption of living history interpretation and the growing popularity of Colonial Williamsburg in the years leading up the 1976 Bicentennial created a surge in living history.<sup>13</sup> While Anderson depicts the history of living history well he neglects to explore further that, despite the popularity, the open-air museum field and living history existed and operated somewhat separately. It was not until 1981 that the ALHFAM opened up institutional membership to more than just farms and offered membership to all living history sites.<sup>14</sup> It is easy to see how quickly the living history model of education prospered, but its popularity and success would not be fully realized without its introduction at open-air museums. While many people associate living historians with open-air museums, Anderson’s narrative insinuates that living historians are their own field. Throughout the twentieth-century, open-air museums and living history have been morphed into the same category of “living history museums,” but it is important to

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11 Anderson, 33.

12 Anderson, 33.

13 Anderson, 36. Notes how the National Park Service was challenged by living history spokesman Freeman Tilden’s *Interpreting Our Heritage* and implemented living history at many of its sites. In 1970, the NPS *Keep It Alive! Tips on Living History Demonstration*; 1974 *The Audience and You: Practical Dramatics for the Park Interpreter* and the later, *Living History in the National Park Service*, provided guides for the field to embrace living history.

14 Anderson, 39.

remember the progression of the two models and the distinctions between them.

### Evolution of the Open-air Model

As the open-air living history model gained popularity in the United States, the process of creating one became increasingly complex. In 1988, Thomas Angotti explored the physical formation of open-air museums in the United States and the decisions encountered by planners. In the article, Angotti believed a major distinction between the formation of open-air museums in the United States and Europe was the inclusion of an open air museum within the urban form of an American city. Colonial Williamsburg diverged from its European counterparts because it formed in the downtown of Williamsburg, Virginia – as opposed to a rural village like Skansen in Sweden. In his analysis, Angotti also attempted to define characteristics of an open-air museum/museum village, stating:

(a) It is a collection of at least several buildings; (b) the buildings are representative of a previous historical periods; (c) the buildings are essentially exhibits that are open to the public on a regular schedule; and (d) the major function of the museum is educational.<sup>15</sup>

Angotti's analysis is one of the only known attempts to define an open-air museum and the characteristics are attune with open-air museums in modern day. One major critique of Angotti's analysis is his failure to address the use of the museum grounds beyond educational visits. As open-air museums have evolved, these institutions are used and valued for more than just education and a particular growing trend is recreational use. This tendency is seen at both Colonial Williamsburg and OSMG, where locals recognize the museum grounds as desirable space for recreational activities such as running races, bike races and charity walks. Open-air museums fit into the modern metropolis in many ways: as public space, as a place for education, a site to take visiting family members, and as space for large-scale public events. The recreational trends illustrate that open-air museums have gained substantial influence in the communities in which they are located since the 1980s when Angotti researched and wrote his piece.

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15 Thomas, Angotti, "Planning the Open-air Museum and Teaching Urban History." *Curator: The Museum Journal* 34, no. 3 (1982): 180.

The author further dissected the development of open-air museums into choices that the founders and planners must make:

(a) between restoration and reconstruction of buildings; (b) between preservation or reconstruction insitu on the one hand and transfer of the buildings to a museum site on the other; (c) between ad hoc development of the museum, where the building location follows an incremental growth pattern; planned development, where the buildings are located to facilitate viewing as exhibits; and a planned urban pattern, where the building location adheres to a historically determined layout; (d) between museums of rural architecture and folklore, and urban or town museums; (e) between museums that largely serve an educational purpose and those that are made “living” by means of programmed activities (such as crafts, cultural events, etc.).<sup>16</sup>

With his analysis, Angotti raises more questions than answers but he does question subjects that many in the field avoid. How many of these museums were formed with master plans like Colonial Williamsburg, and how many utilized more ad hoc development like Greenfield Village? Do all open-air museums utilize living history?

No two open-air living history museums are completely alike. Although many of them seek to tell similar stories, they do so in different locations and various scales of operation. Development of open-air living history museums depends on a number of factors, such as funding, local politics, public support, and land and building availability. These factors subsequently influence operations and management in the current day. However, with many practitioners a discussion on this subject often turns into a competitive subject. Many researchers and practitioners involved with open-air living history museums are passionate about the idea of authenticity. Comparisons between which open-air museums have more restored buildings than the next and who was founded first are common. Yet, many professionals miss the overarching importance of open-air museums by participating in this debate.<sup>17</sup> Varying degrees of authenticity is a part of it, but not necessarily the driving force for open-air living history museums. Regardless of the status of “authentic environments” or development history, these museums are considered a special place for the communities in which they are located.

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<sup>16</sup> Angotti, 182.

<sup>17</sup> “Living History.” *The Association for Living History, Farm and Agricultural Museums (ALHFAM)*, April 11, 2013. [http://www.alhfam.org/?cat\\_id=153&nav\\_tree=153](http://www.alhfam.org/?cat_id=153&nav_tree=153).

Through the narratives of Rentzhog, Anderson, and Angotti, the development of open-air museum field has evolved from its starting institutions to a well-established field. However, as the next section explains, the movement changed in the late-twentieth century with the advent of hard-hitting, out-of-field critiques of open-air living history sites.

## Criticism of Living History

The presentation of history and the matter of authenticity are ever-unfolding topics in the open-air living history museums field. Not everyone speaks as highly of living history museums as Rentzhog, Anderson and Angotti, nor does everyone agree that open-air living history museums are a good aspect of preservation or a quality didactic tool. The notable critique of Colonial Williamsburg, *The Unreal America: Architecture and Illusion*, by Ada Huxtable sharply stated her dismay about the practices of reconstruction, history making, and presentation of facts to the public.<sup>18</sup> For Huxtable, the re-created features at Colonial Williamsburg were not culture, but entertainment. At the time of her critique, Huxtable's work caused a stir in the museum world and a subsequent re-evaluation of Colonial Williamsburg. A more detailed study of Colonial Williamsburg, *The New History in an Old Museum: Creating the Past at Colonial Williamsburg* by Gable and Handler explored all aspects of the organization, its interpretation, the public, and staff's perception of the whole operation.<sup>19</sup> The authors realized in their research that to understand Colonial Williamsburg comprehensively, they needed to "study everything that was going on around us, we inquired about bus operations as well as history making."<sup>20</sup> Gable and Handler noted that many scholars of museums ignore the fine-balance organizations must master between business and education and importance of corporate identity.

The impact of these two studies on the museum world cannot be underestimated. As a result, many museums have embarked on a long purpose-searching effort to recreate and portray historical events as accurately as possible. These critiques placed pressure

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18 Ada Louise Huxtable, *The Unreal America: Architecture and Illusion* (New York, New York: The New Press, 1997).

19 Richard Handler and Eric Gable, *The New History in an Old Museum: Creating the Past at Colonial Williamsburg* (Duke University Press, 1997).

20 Handler and Gable, 21.



on open-air living history museums to justify decisions to recreate sites, move buildings, demolish non-conforming structures, and embellish history. Most museums have enacted new interpretations and added hands-on experiences to their tours. Other museums rely on historical accuracy to a certain level, but recognize that audiences wish to have some modern conveniences. This advancement helps give open-air museums an elite reputation in the history museum field.<sup>21</sup>

## Studying History Museums

While Huxtable's and Gable & Handler's works mark the first round of major museum criticism, they point out the complexities in accomplishing the task of evaluating a museum. Should a study focus solely on interpretation, the organizational corporate identity, or the visitor experience? Rosenzweig and Thelen conducted a comprehensive national survey in 1998 in an effort to find out how the general public views history and value history museums. Their findings suggest that many people feel museums present real history and many Americans cite museum visits with family and small groups as collaboratively stimulating. According to Rosenzweig and Thelen, "Museums give visitors a sense of intimacy – of personal participation – that respondents associated with eye witnesses. They evoked the intimacy of family gatherings; and they encouraged an interaction with primary sources that reminded respondents of independent research."<sup>22</sup> The authors believe museums are important space for providing Americans with a collective civic experience. The Rosenzweig and Thelen project is essential for museum studies as an early attempt to gain insight into museum clientele. There is a need in the museum world to replicate the Rosenzweig and Thelen study, as a way to better integrate visitor values into museum management decisions.

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21 Anders Greenspan, *Creating Colonial Williamsburg: The Restoration of Virginia's Eighteenth-Century Capital*. 2nd ed. (UNC Press Books, 2009) 1, 128, 166, and Warren Leon, and Roy Rosenzweig, eds. *History Museums in the United States: A Critical Assessment*. (Chicago, IL: University of Chicago Press, 1989) 87.

22 Roy Rosenzweig and David Thelen, *The Presence of the Past: Popular Uses of History in American Life*, (New York, New York: Columbia University Press, 1998), 106.

## Museum Evaluation

Researchers have noted a shortcoming in literature on museum evaluation for decades and this thesis is not the first narrative to demonstrate a need for additional studies in the museum field. One of the first appeals for more literature came from historian Thomas Schlereth in 1980 when he wrote about a lack of museum analysis in the field. He stated, “My first concern is that history museum historians simply do not do enough museum history.”<sup>23</sup> Schlereth called for an autobiography of the history museum, as there was scant attention devoted to the origins and influences of history museums. Schlereth alleged that art museums are steps ahead of history museums in their willingness to “subject their collection policies, administrative decisions, and perhaps most importantly, the purpose, scope and interpretations of their collections and exhibitions to historical interpretation.” Others agree about the lack of critiques from within the field, as Leon and Rosenzweig described how up until the late 1980s, there was silence in the museum world.<sup>24</sup> No one wanted to critique themselves or each other. Leon and Rosenzweig reported that in the late 1980s, several journals broke the silence and announced museum-exhibit review sections. Soliciting self-criticism about the lack of museum evaluation was a major objective of Leon and Rosenzweig’s work.

Another major advancement in the museum field was the progression of evaluating museum exhibits to investigating the entire museum operation and purpose. In an effort to professionalize the museum field, the American Association of Museum’s Museum Assessment Program (MAP) provides technical assistance to museums in the context of overall museum operation.<sup>25</sup> The program has been in operation since 1981 and helped set benchmarks for museum professionalism. While the MAP provides valuable professional advice, the program fails to address measuring museum impacts on the community.

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23 Schlereth, Thomas. “The History Behind, Within and Outside the History Museum.” *Roundtable Reports* 5, no. 3. A Report on Museum Practitioner Seminars (1980): 12–16.

24 Leon, Warren, and Roy Rosenzweig, eds. *History Museums in the United States: A Critical Assessment*. (Chicago, IL: University of Chicago Press, 1989).

25 “Museum Assessment Program,” accessed January 21, 2013, <http://www.aam-us.org/resources/assessment-programs/MAP>.

In 2006, Falk and Sheppard attempted to provide insight as to how museums operate and why self-assessment is limited. As described by the two authors, the often top down, paternalistic, mass market features of many museum models was derived from the Industrial Age and the business practices of the early twentieth century when many museums formed. The authors provide a key observation for the museum field: “as we find ourselves in a new age, museums need to readjust.”<sup>26</sup> The authors’ readjustment process involves management models that rely on more bottom-up approaches, matching the needs of the public, and building mutually supportive collaborations of organizations of shared values. For Falk and Sheppard, there is no single path to success, but museums need to use empirical research to justify their decisions. As an example, the authors described how Old Sturbridge Village in Massachusetts went through a period of readjustment. The museum had previously relied on attendance income, but following the peak of heritage tourism in the 1970s, the museum’s financial stability diminished. To rectify, Old Sturbridge Village changed their management protocol. They started tracking attendance trends and every staff member participated in a strategic planning process, not just the senior managers. This example and Falk and Sheppard’s work gives historical context on how museums operate and suggests a model of evaluation and recommendations for improving museum management. While the narrative gives some examples, it does not fully explain the severity of the problem. The lack of self-analysis and resistance to change is a trend that is frequently seen in the museum field. There is a need for more works like Falk’s and Sheppard’s to point out these shortcomings.

## Measuring Museum Impact

The lack of museum evaluation and self-analysis deserves attention some professionals have started a response to the issue in order to alter the culture of museums. Australian researcher Lynda Kelly stated the matter simply with, “there is a need for museums to stay relevant.”<sup>27</sup> The desire to remain sustainable in a tough economy has caused many

26 John Falk and Beverley Sheppard, *Thriving in the Knowledge Age: New Business Models for Museums and Other Cultural Institutions*, (AltaMira Press, 2006), 13.

27 Lynda Kelly, “Measuring the Impact of Museums on Their Local Community,” (November 2006,) 1, <http://www.australianmuseum.net.au/publication/Measuring-the-impact-of-museums-on-their-local-community>.

museums in the United States to test some variation of self-evaluation. The most common methods museums approach self-assessment is through visitor studies or economic impact. These are a step in the right direction, but do not fulfill the need to self-evaluate museum impact holistically.

### **Visitor Studies**

Many museums track visitor attendance, and publish this information for funders and museum records. The heritage tourism peak in the United States came in the years following the 1976 Bicentennial, and attendance has been shrinking at most open-air living history museums ever since. To combat this, many museums have tried more in-depth visitor surveying to track clientele opinions in addition to sheer numbers. Reach Advisors, a leading research firm embarked on a study in 2008 with thirteen participating open-air history museums to investigate why museum goers visit and why the sites are important. Their findings suggest that authenticity in the form of historical accuracy is a key attraction for museum visitors. The study asked why people visit history museums and the most common answer was: “stepping back in time and immersing myself in the past.”<sup>28</sup> Reach Advisors also explored the concept of inherent authenticity at history museums. The authors warn historic sites about signaling authenticity; claiming authenticity sends the public a faux flag. Instead, Reach Advisors propose museums rely on visitor experience (more immersive activities) and careful site planning (do not include technology for the sake of technology) to present an authentic environment. For Reach Advisors, the inherent authenticity at outdoor history museums is what sets them apart from theme parks. While the Reach Advisors study is an important piece of literature, it stands alone as a qualitative study that investigates visitor feedback on a large scale at open-air history museums.

Some professionals believe the Reach Advisors study does not go far enough and a more holistic approach is needed. Sharpley and Stone mention this lack of comprehensive tourist experience literature in their 2011 book, *Tourist Experience: Contemporary Perspectives*.

Sharpley and Stone believe “visitors make a pilgrimage to a heritage site because the

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<sup>28</sup> Susie Wilkenning and Erica Donnis, “Authenticity? It Means Everything,” *The American Association for State and Local History* (Autumn 2008): 22.

site is meaningful to them.”<sup>29</sup> The authors note because exact experiences are defined by individual perceptions, values, and attitudes, understanding the tourist experience is difficult. The authors call for more qualitative inquiry in tourism research. According to Sharpley and Stone, tourism does not fit neatly into quantitative or qualitative categories of research, and many studies are overly influenced by economic impact. They see an opportunity for the field of tourism research to diversify its methodological perspectives. It is this type of whistleblowing literature that is needed in the museum world. The subject of the visitor experience is starting to gain more attention in the museum world, but a profession-wide understanding of how visitors view open-air living history museums is still insignificant.

### **Economic Impact**

The introduction of the economic impact analysis to the museum and historic preservation realm was widely believed to prevail as the dominant method of impact analysis. However, there are numerous ways of estimating economic impact, which makes determining one superior technique challenging. Furthermore, numerous authors believe overestimation of economic impact and overreliance on quantitative data is a problem in the museum field. Nonetheless, the three methods described below are commonly relied upon in the United States and the United Kingdom to quantify the economic impact of museums.

#### *Preservation Economic Impact Model*

The most well-known model in the United States is the National Park Service, University of New Jersey joint collaboration entitled, “The National Economic Impact Model.”<sup>30</sup> The metric, downloadable online, includes options to estimate the economic impact of four environments: 1) Main Street, 2) Heritage Tourism, 3) Historic Rehabilitation, and 4) Historic Sites, Organizations, Museums. If a museum chooses the heritage tourism position, the model calculates tourism impacts. If the museum chooses the Historic Sites option, the model computes economic benefits as a result of museum expenditure and attendance

29 Richard Sharpley and Philip R. Stone, eds., *Tourist Experience: Contemporary Perspectives* (Routledge, 2011), 207.

30 “Preservation Economic Impact Model,” *NTCIC*, accessed March 8, 2013, <http://ntcicfunds.com/services/preservation-economic-impact-model-2-0/>.

revenue. There is a function to include “all of the above,” in the system, therefore estimating the economic impact of all four circumstances for the area. The results page exhibits the economic impact in the context of the state economy. Main Street organizations rely heavily on the model, but it has yet to prove its effectiveness in museum-specific impact assessments. One of the NPS model’s shortcomings is the input requirements: of which one is overnight visitation and overnight attendance revenue; many museums do not collect such information through their visitor feedback.

#### *Americans for the Arts*

A second metric used by museums in the United States is the Americans for the Arts “Economic Prosperity Calculator.”<sup>31</sup> Available on the Americans for the Arts website, the online tool uses simple inputs of 1) area population, 2) visitation, and 3) museum expenses. The output considers four economic measures to define impact: full-time equivalent jobs, residential household income, and revenue to local and state governments. Unlike the other two methods, the Americans for the Arts method does not rely on a multiplier, as the authors affirm that a multiplier results in overestimation of the economic impact and lacks reliability.<sup>32</sup> The model is gaining popularity in the museum world as it is used to estimate statewide non-profit cultural impacts.

#### *AIM Toolkit*

One notable economic impact framework from the United Kingdom is the Association of Independent Museum’s “Economic Value of the Independent Museum Sector Toolkit.”<sup>33</sup> The framework, also downloadable online, relies on three subjects in the input: 1) Tourism impacts, 2) Employment Impacts, and 3) Impacts of Spend on Goods and Services. The economic analysis includes measures to account for deadweight, displacement, leakage, and a multiplier to estimate induced impacts. The framework relies on some pre-determined

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31 “Arts & Economic Prosperity IV Calculator,” *Americans for the Arts*, accessed March 8, 2013, [http://www.artsusa.org/information\\_services/research/services/economic\\_impact/iv/calculator.asp](http://www.artsusa.org/information_services/research/services/economic_impact/iv/calculator.asp).

32 K.S. Browning, J.D. Pettijohn, and S. Shaughnessy, “Arts and Economic Prosperity: The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences In the State of North Carolina” (2011), 23.

33 “Economic Value of the Independent Museum Sector: Toolkit,” n.d., <http://www.aim-museums.co.uk/downloads/4548406d-dd71-11e1-bdfc-001999b209eb.pdf>.

assumed values for deadweight, employment leakage, spend leakage, displacement, and multiplier. The calculation is simple and can be done by hand or in Microsoft Excel. The results page presents the three areas of impact separately, unlike the overall rough number presented in the two other models. The benefit of the AIM Toolkit is its simplicity; museums can calculate their impact by hand instead of relying on complex computer generated numbers.

While all these methods of economic impact analysis are fairly straightforward, they fall short in fulfilling the need to assess the overall impact of the museum. Solely relying on the economic argument for valuing museums is restricted, as museums provide copious benefits to well-being. The intrinsic value of a visit to a historic site cannot be determined by economics.<sup>34</sup> Combining both quantitative and qualitative approaches to assessing museum impacts is the most promising perspective for a complete evaluation.<sup>35</sup>

### Holistic Evaluation

The limitations of solely relying on economic studies or visitor studies illustrate the need for a more holistic type of study. Yet, this lack of holistic evaluation means that researchers to prove the effectiveness of a comprehensive method and its merits are worth the extra time it may take to understand. According to a Sara Selwood Associates study in 2010, museums “know very little about the true context of its cultural impacts – what they are, how far reaching they are, who benefits and how.”<sup>36</sup> Commissioned by the National Museum Directors Conference in the United Kingdom, the Selwood report demonstrates the wide range of cultural impacts of museums, that many may not consider using only an economic impact study. The essay attempts to explore other cultural impacts and investigates strategies to do so.

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34 For more see, Carol Scott, “Advocating the Value of Museums.” Vienna, 2007. <http://www.intercom.museum/documents/CarolScott.pdf>. As defined by researcher Carol Scott, intrinsic values are the intangible experiences of a museum visit that are particularly meaningful or moving for a visitor. Experienced as a ‘state of absorption,’ or ‘captivation,’ and the ‘deep satisfaction,’ of a museum visit.

35 Luis Delfim Santos, Isabel Martins, and Paula Brito, “Measuring Subjective Quality of Life: A Survey to Porto’s Residents,” *Applied Research in Quality of Life* 2 (2007): 53.

36 Sara Selwood Associates, “Making a Difference: The Cultural Impact of Museums: An Essay for NMDC,” (July 2010), 4.

In the search to understand the impact of museums, there is an apparent need for holistic studies of museums. The most promising work comes from the United Kingdom and Australia. Carol Scott's 2003 piece "Measuring the Impact of the Arts," notes that necessities for museum impact evaluation come from 1) concerns of financial sustainability of museums, 2) competition, and supply of demand may exceed actual demand, and 3) greater transparency/accountability climate in public sector organizations. In the United Kingdom, the government is starting to require museums to demonstrate their impact, but Scott highlights that a culture of evaluation is not sufficiently embedded in museums and there are no agreed upon methodology. According to Scott, "the field of impact assessment is unformed and untested in relation to museums."<sup>37</sup> In an attempt to prove the usefulness of impact assessment, Scott conducted a study, the conclusions of which suggest: 1) museums build social capital, 2) museums develop communities, 3) museums contribute to social change and public awareness, 4) museums build human capital and 5) museums provide economic benefits. Scott's study establishes a solid foundation and starts to define the problems, but there is no agreed upon method for how to approach museum impact evaluation.

Australian researchers are leading the field in how to best tackle this issue of standard holistic evaluation of museums. Lynda Kelly, an Australian audience researcher, believed the conceptual framework for studying social capital is a suitable model for evaluating the impact of museums.<sup>38</sup> Her aforementioned work, *Measuring the Impact of Museums on Their Local Community*, argued how critical it is for museums to use studies and impact evaluation to show their valued role in the community. Similarly, Australian researchers Burton and Griffin proposed social impact studies, which encompass social capital, as an appropriate holistic methodology for understanding museums. Their model allows for input/outcome audits, measures volunteer programs and capacity enhancement. Burton and Griffin believe the key to assessing impact is pinpointing the presence of the museums, in the form of programs, policies and activities, and then determining how this presence

<sup>37</sup> Carol Scott, "Measuring the Impact of the Arts," *Curator: The Museum Journal* 46, no. 3 (July 2003): 296.

<sup>38</sup> Lynda Kelly, "Measuring the Impact of Museums on Their Local Community," (November 2006), 2.



contributes to social capital. The authors do not assume a complete lack of social capital before the presence of the museum, but seek to measure how museums contribute to the stock of social capital in the local community. Their framework involves a network of trust, reciprocity, beliefs and behaviors. While the authors' study is considered a success, they note "the weakness lies in the inability to consistently apply these [methods] in ways that demonstrates the impact [of the museum] on an individual and community."<sup>39</sup> Burton and Griffin establish that previous piecemeal attempts to study museum impact are insufficient and summon standard methodologies that can be replicated.

### Quality of Life as a Method

To answer the call of researchers asking for a holistic measure, open-air living history museums should consider methods utilized by the city planning profession. Across the globe, the quality of life methodology is rapidly gaining momentum as a tool used by municipal governments to ensure they reach their goals and meet the needs of residents. In 2011, authors Rhonda Phillips and Jay Stein proposed using community indicators to provide evidence for municipal governments to reach goals in historic preservation and economic development.<sup>40</sup> For Phillips and Stein, the presence of historic resources does not automatically increase a community's quality of life; therefore, efforts must be made to ensure historic resources are used to meet resident's needs. Community indicators, as discussed by Phillips and Stein, are reflective of community values and gauging these indicators in a holistic manner affords a more balanced perspective. Phillip's quality of life framework investigated four main subjects: gauging (type and amount of historic resources, perspectives and values), protecting (ordinances and regulations), enhancing (partnerships and incentives), and interfacing (uses) (Table 1). Through a monitoring program, city planners can better focus on historic preservation as a tool for economic development.

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39 Christine Burton and Janette Griffin, "Investigating Social Impacts of Small Museums in Local Settings: Implications for Policy Making," *ICCPR 2006: Fourth International Conference on Cultural Policy Research* (July 2006): 3.

40 Phillips, Rhonda, and Jay Stein. "An Indicator Framework for Linking Historic Preservation and Community Economic Development." *Social Indicators Research* (2011). <http://www.springerlink.com/content/j3t4186157728877/>.

Rhonda Phillips is a leader in the US scholarship on quality of life was also included the 2006 publication “Contribution of Historic Preservation to the Quality of Life in Florida,” a collaborative project involving multiple agencies and authors.<sup>41</sup> The report covered various aspects of historic preservation and quality of life. The most critical part of the report for consideration of this thesis is Dr. Glenn Willumson’s chapter, “Report on History Museums and the Relevant Indicators to Assess Their Impact on the Quality Of Life in Their

Type	Indicator Name
Gauging	Historic Fabric Districts, structures, landmarks Distressed historic neighborhoods Rehabilitation Tax Credits Assessed property value trends Historic district/property reinvestment Amount and type locally-owned businesses Sense of place/Identification with place/ Attachment to place
Protecting	Historic preservation element/plan and integration with community planning Design guidelines Historic preservation commission Preservation ordinances Historic preservation survey Historic preservation staff Certificates and enforcement actions
Enhancing	Participation in Main Street or other nationally sponsored programs Certified Local Government status or other certification programs Participation in other state/federal programs Number and type of historic preservation nonprofit organizations Neighborhood participation Civic/museum partnerships Incentive programs Gentrification—programs to prevent
Interfacing	Use and access by citizens—internal, external, visible, cost Housing affordability and percent affordable historic houses Business use and types Community draw factors Community use factors Heritage/cultural interactions and skills

Table 1. Rhonda Phillips Quality of Life Framework.

41 Glenn Willumson, Timothy McLendon, Kirstin Larsen, JoAnn Klein, Rhonda Phillips, Lori Pennington-Gray, and John Confer, “Contributions of Historic Preservation to the Quality of Life in Florida” (University of Florida, November 2006).

Communities.”<sup>42</sup> Willumsom approached museums’ impact on quality of life by defining three areas that museums have an assumed impact: education, community, and economy (Table 2). The indicators and variables to measure them, as developed by Willumson,

begin with the museum as institution and look outward at their impact on the community and the community’s response to those efforts. Consequently, indicators for museums assess what specific activities museums are supporting in order to enhance the quality of life in their communities.

Type	Indicator
Education	Support for elementary education Support for middle school education Support for secondary education Support for lifelong learning
Community	Civic-Museum partnerships General outreach to local community Support for local or regional identity Support for diversity of thought
Economic	Business-Museum partnerships General outreach to tourist community

Table 2. Glenn Willumson’s Quality of Life Framework.

Willumson’s museum impact assessment study surveyed over two hundred history museums in Florida. As a quality of life methodology for museums, the Florida study is a preliminary foundation, and represents the first attempt in the United States to use quality of life metrics to evaluate the impact of museums.

To validate the effectiveness of quality of life metrics, standardization and large scale projects are required. A research program from the municipal government discipline entitled the Global City Indicators Project is a world-wide leading example of how to

<sup>42</sup> Glenn Willumson, “Report on History Museums and the Relevant Indicators To Assess Their Impact on the Quality of Life of their Communities,” In “Contributions of Historic Preservation to the Quality of Life in Florida.” (University of Florida, November 2006), 5.

implement such a standardized-large-scale-framework.<sup>43</sup> Operated by the University of Toronto, the Global City Indicators Facility is supported by the World Bank, the Government of Canada and participating membership cities. The program operates a free web-based information portal, allowing cities to self-identify common issues in municipal planning. The indicator framework includes just over 100 required indicators that all membership cities track, and over 1000 optional indicators. The indicators and variables that measure them rely on data that is readily available, current, and able to be reported annually. The GCIP serves as a great reference for the museum field to implement a similar program. It is clear the field needs a host organization, a set of uniform indicators and optional indicators for flexibility between sites. This can enable a standardized system for data collection, analysis and sharing to assess museum impacts on quality of life.

## Conclusion

By incorporating the knowledge presented in the literature of open-air living history museums, museum evaluation, and quality of life metrics, this thesis will demonstrate through a pilot study how quality of life methodologies can be used to evaluate a museum's impact. This information is presented in the hopes of inspiring further investigation into the quality of life method as a suitable metric for open-air museums to assess their impact on the communities in which they are located.

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43 "Global City Indicators Project," n.d., <http://www.cityindicators.org/themes.aspx>.

## Chapter 3: Methodology

### Introduction

The research process is composed of two major undertakings from May 2012 to May 2013. Beginning in May 2012, an initial literature review and method development established the process for a summer internship at Old Salem Museums and Gardens. The internship and resulting project report served as the foundation of the thesis process and informed the required analysis during the academic year 2012-2013. Thus, the final thesis report brings together the internship report and academic year analysis to culminate into the yearlong project.

### Pilot Museum

The research interests were limited to the impact of museums on the quality of life in the communities they are located in and a pilot study museum was chosen. The reasons for choosing Old Salem Museums and Gardens as a pilot are numerous:

- It is not as well-known as other open-air museums such as Colonial Williamsburg, therefore less studied; and its smaller scale allows for a more comprehensive assessment.
- It is in an urban setting and was implemented in the second wave of open-air museum development in the 1950s.
- The site offers three types of museum experience: living history (including agricultural), open-air self-guided visitation, and indoor guided gallery exhibits.
- As a regional museum, it is closely connected to the community and local heritage, yet has a national following for the Museum of the Early Southern Decorative Arts.
- It competes with other significant museums in the area, including smaller open-air history sites interpreting similar heritage.
- The museum's willingness to self-assess and collaborate on the project.

### Indicator Framework

Following the selection of the pilot museum, an analysis of relevant literature was undertaken to establish a firm precedent for the quality of life metric system and current need for a standardized methodology. From that, a quality of life indicator framework

suitable for evaluating Old Salem was created. The framework is directly inspired from the works of Rhonda Phillips, Glenn Willumson, Christine Burton and Janette Griffin, Lynda Kelly, and Carol Scott. The indicators and variables to measure them were chosen as areas

Type	Indicator
Education	Elementary Education Middle School Education Secondary Education Support for Lifelong Learning Preservation Staff and Resources
Community	Social Capital Civic – Museum Partnerships Regional Identity Public Awareness Working with Government Agencies Membership Local Versus Non-Local Local Amenities Neighborhood Participation
Economic	Property Sales Premium Homeownership Rates Business Partnerships Sponsored Events Real Estate Player Job Creation Tourism Impacts Farmers Market
Physical Character	Historic Fabric Landmarking Design Guidelines Restoration and Property Reinvestment Walkability Gardens and Landscaping Geography and Connectivity

Table 3. Pilot Study Quality of Life Framework

that Old Salem is assumed to impact, and supported with available data or appropriate proxies. The variables are divided into four categories: education, community, economic and beautification. After Table 3, a description and form of measurement is provided for each indicator is listed below.

Educational Indicators	<i>Middle School Education</i> – What programs are available to engage middle school age children? Indicates the museum level of commitment to education.
	<i>Secondary Education</i> – What programs are available to engage secondary educational needs? Indicates the museum level of commitment to education.
	<i>Support for Lifelong Learning</i> – What programs are available to encourage lifelong learning? Indicates the museum level of commitment to education.
	<i>Preservation Staff and Resources</i> – Does the museum have staff dedicated to historic preservation and sharing knowledge/resources? Is this required by staff contracts? Demonstrates the museum staff's commitment to historic preservation in the community.
Community Indicators	<i>Social Capital</i> - Measures the value of horizontal and vertical social interactions, empowerment, and inclusion efforts. Indicates the museum's impact on social capital, and extent to which the museum inspires social capital.
	<i>Civic – Museum Partnerships</i> - In what ways, when and how often is the museum used by civic groups, working with local government, increasing public awareness about the museum? Indicates how much the local community values the presence of the historic site and museum.
	<i>Regional Identity</i> – Do citizens have meaningful connections to the museum? Measures how much influence the presence of the museum has in forming significant connections to the public.
	<i>Public Awareness</i> – Does the public remain informed about what the museum is, provides, and events going on? Indicates level of effective public communication, response, and willingness of the museum to collaborate.
	<i>Working with Government Agencies</i> – How does the museum work with local officials? Indicates the museum's willingness to collaborate with local officials to serve community goals in historic preservation.
	<i>Membership Local Versus Non-Local</i> – How many members



	are local versus non-local? Indicates level of support by local area residents for the continuation of the museum.
	<i>Local Amenities</i> – What does the museum provide and what sorts of amenities are supported in the historic district? Indicates incorporation of historic preservation in local economic development activities. Measures the museum’s willingness to engage in small business incubation.
	<i>Neighborhood Participation</i> – How often do neighborhood residents visit the museum? Indicates how empowered residents feel and serves as possible indicator for future neighborhood participation.
Economic Indicators	<p><i>Property Sales Premium</i> – What is the real estate premium in price per square foot for a residence in the Old Salem Historic District? Indicates demand of authentic historic real estate and proximity draw of the museum.</p> <p><i>Homeownership Rates</i> – How do the homeownership rates compare to state and national averages? Measures stability of real estate market in the neighborhood.</p> <p><i>Business Partnerships</i> – With whom does the museum do business? Determines breadth of business transactions, the more local the better.</p> <p><i>Sponsored Events</i> – How often does the museum sponsor events for the community at large? Indicates demand for special events and willingness to be more than a museum.</p> <p><i>Real Estate Player</i> – How many buildings does the museum own and maintain? Indicates willingness to take responsibility for the historic built environment.</p> <p><i>Job Creation</i> – How many people does the museum employ? Measures employment standards, and induced jobs.</p> <p><i>Tourism Impacts</i> – How much do heritage tourists contribute to the local economy? Measures the impact of visitors on the Winston-Salem economy.</p> <p><i>Farmers Market</i> – Is the farmers market economically profitable? Measures if the farmers market is a worthwhile endeavor for the museum.</p>
Physical Character Indicators	<p><i>Historic Fabric</i> – Characterize and quantify the historic resources in the neighborhood. Indicates level of integrity of the historic neighborhood and historic resources left.</p> <p><i>Landmarking</i> – How many of the buildings in the neighborhood are landmarked? Measures the public value of historic buildings.</p>



*Design Guidelines* – What design controls are available? Indicates level of enforcement and response.

*Restoration and Property Reinvestment* – How much restoration occurs in the neighborhood? Measures public investment in the historic district.

*Walkability* – What is the scale of the neighborhood? Measures pedestrian scale of the neighborhood and functional use by the public.

*Gardens and Landscaping* – Characterize the garden and landscaping environment in the neighborhood.

*Geography and Connectivity* – Where is the museum located in relation to other amenities? Indicates past, present, and future functions of the space.

## Multi-methodological Approach

Both qualitative and quantitative approaches were taken to gather data for the indicators. Following the literature review, the author interviewed numerous Old Salem senior staff, Moravian Church officials, community members and experts. The purpose of the interviews was to identify perceived impacts and contributed to the analysis of social indicators. Next, the author undertook three methods of evaluating economic impact (PEIM, Americans for the Arts, AIM Toolkit) using fiscal year 2012 data. Other forms of economic data were collected from OSMG, the City of Winston-Salem, local real estate appraiser Greg Gordon.

The author then developed three surveys, one for the economic impact of the Old Salem Farmers Market, a visitor survey, and a resident survey. Over 100 responses were collected for the visitor survey, which was conducted in person on the Fourth of July and the day after. The Farmers Market economic impact and resident surveys were conducted online using Survey Monkey and Google Survey, respectively. The purpose of the surveys was to provide information for gauging indicators in all four categories of the framework. Specific questions provided data for interpretation of Old Salem's impact on regional identity, views on landscape appearance and purpose of the museum. The author undertook Geographic Information Systems (GIS) analysis to investigate geography and connectivity of Old Salem to the community. Relying on maps, and comments from both visitors and residents, the

GIS maps provided a basic analysis of the walkability of the neighborhood. The majority of the other indicator variables relied on proxies from Old Salem Museums and Gardens. Other indicators were informed by museum data on property ownership, demographics of employees, and geography of memberships.

The final stage of analysis completed during summer 2012 included evaluating the recent Old Salem Museums & Gardens strategic plan and capital campaign to understand how the museum prepares to reinforce its impact on the community. Finally, recommendations were crafted for the museum to consider in its long range planning efforts. A presentation to the OSMG senior staff in August revealed several areas for further consideration, a need to expand the literature review and determine the universality of this final project. The internship established the need for such an analysis in the museum world as it is rarely performed in the United States.

The author embarked on further analysis of relevant literature in fall 2012 and winter 2013. Integration of the pilot project and additional literature review led to the final methodological procedure. A discussion section deliberates the successes and failures of the pilot project and considerations for further implementation. Appendix E outlines the suggested methodology for replication of the pilot project.

## Chapter 4: Pilot Study at Old Salem

### Executive summary

As an open-air living history museum emphasizing the historic Moravian culture in North Carolina, Old Salem Museums & Gardens is assumed to have considerable meaning and influence in the community. However, understanding what that impact is and how the museum affects the quality of life of the citizens of Winston-Salem is less well-known. This project evaluates the impact of Old Salem Museums & Gardens on the quality of life in Winston-Salem, North Carolina in an attempt to provide the museum with a measurable sense of influence, presence and value. The final product includes recommendations for Old Salem to reinforce its positive impact on Winston-Salem.

### Objectives

For Winston-Salem, North Carolina, the Moravian history and identity is visible in the everyday life and landscape. The restored historic town of Salem leads this continued regional identity through the presentation of the local history in the incredible tangible setting at OSMG. The restoration of Salem was modeled after Colonial Williamsburg and improved upon the open-air living history approach by pursuing a more community-centered method where civic and museum partnerships are crucial. Today, the historic town of Salem, called Old Salem, consists of the open-air living history museum, an active church, a college and academy, and private residents all sharing the cultural heritage. The presence of this unique historic built environment and collective management strategy augments the character of Winston-Salem, North Carolina.

### Indicators

As stated by quality of life scholar Rhonda Phillips, “a community’s quality of life reflects values inherent to that community.”<sup>44</sup> Phillips and author Glenn Willumson’s work

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<sup>44</sup> Rhonda Phillips and Jay Stein, “An Indicator Framework for Linking Historic Preservation and Community Economic Development.” *Social Indicators Research* (2011), 8.

primarily influenced the framework of indicators crafted for this project.<sup>45</sup> The indicators and variables for measurement them were chosen as subjects that Old Salem is assumed to impact in Winston-Salem. These indicators help demonstrate how Old Salem makes or contributes to an impact, but not necessarily cause an impact to happen.<sup>46</sup>

## Education

The first category of indicators, education, is the easiest to make a case for as the quality of life benefits of education are well-recognized.<sup>47</sup> Yet in the museum field there is no agreed upon method for evaluating educational programming impacts. The Institute of Museum and Library Services has numerous resources for how to evaluate museum programming.<sup>48</sup> In this analysis, the process to evaluate the educational impacts of OSMG involves taking inventory of the educational programming available to audiences of various age and affinity groups. The purpose of this indicator category is to quantify the specific programming of the museum and gauge its value to the community.

### Museum Education Indicators:

- Elementary Education
- Middle School Education
- Secondary Education
- Support for Lifelong Learning
- Preservation Staff and Resources

Like many museums, OSMG's mission statement is partially rooted in education. The mission statement of Old Salem Museums and Gardens reads:

Old Salem Museums and Gardens in historic Salem, North Carolina provides a uniquely authentic view of real life and material culture during the earliest days of our nation, as

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45 See Glenn Willumson, Timothy McLendon, Kirstin Larsen, JoAnn Klein, Rhonda Phillips, Lori Pennington-Gray, and John Confer. "Contributions of Historic Preservation to the Quality of Life in Florida". (University of Florida, November 2006).

46 Burton & Griffin, 4.

47 Other write about the quality of life benefits of education, this thesis does not explore this topic in depth.

48 "Evaluation Methods." *Institute of Museum and Library Services*, n.d. [http://www.imls.gov/research/program\\_evaluations.aspx](http://www.imls.gov/research/program_evaluations.aspx).

experienced by settlers of the American South in colonial times through the pivotal 100-year period from 1766 to 1866. The experience features:

- Historic Preservation - scores of original buildings and structures
- Re-constituted landscapes and gardens of 18th and 19th century Salem
- The unique history Moravian immigrants and their planned settlement
- Educational programs, interpretation, events and conferences
- The Museum of Early Southern Decorative Arts (MESDA), the most comprehensive collection of Southern material culture and research in America.”

Education, authenticity and experience have and continue to be some of the main goals of the organization. When OSMG opened in the 1950s, the open-air living history model was still a relatively un-informed process, as the benefits of a more engaged interpretation presentation received little attention and research in the field. Former Education Director, Nick Bragg, said in an interview, “I saw how bored the kids were when we first opened, we knew it had to change.”<sup>49</sup> The adaptation of educational programming at OSMG involved adding hands-on experiences and demonstrations. Currently most educational



Figure 2. A school group visits the Vogler House on South Main Street. Image from OSMG.

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49 Nick Bragg, in person interview, June 2012.

programming at Old Salem is hands-on, for all age groups.

On any given day in Old Salem, visitors can pick from three types of museum experiences or take part in all three. The Museum of Early Southern Decorative Arts (MESDA) offers a guided gallery museum experience. The experienced guides at MESDA use the objects to engage audiences, asking visitors to read and interpret artist signatures or guess how old an object is. It is not a typical closed-door gallery tour as MESDA guides truly use the galleries and the objects in them as a classroom for visitors to explore and share knowledge.

The advantage of OSMG being an open-air museum is the ability to wander the streets of the historic town of Salem to take in the environment of historic buildings, shops and landscapes. The cohesive environment of museum buildings inter-mingled with privately owned residences, a tavern, an inn, the college, and the church offers an array of themes to view. In the various museum buildings, the costumed interpreters present the past life of Moravians in the restored homes, workshops, and gardens.

Overall, there are three gallery museums, six residential dwellings including two gardens, two churches, five merchant operations, a school, a firehouse, and an archaeological site to visit at Old Salem. Various other buildings throughout the town are open to the public, operated by the Moravian Music Foundation and Salem College. Old Salem is an incredibly rich didactic environment, as approximately 5 exhibit museums, 16 historic buildings/sites, 8 gardens and 3 points of interest to see in Old Salem.<sup>50</sup>

### **Elementary Education**

The majority of programming at Old Salem Museums & Gardens is designed for elementary-and-middle school-aged children and all programming corresponds with the North Carolina history curriculum. Elementary-age visitation is a large programming model because this age represents a large portion of overall museum visitation. In 2012, 35,331 school children toured Old Salem. They account for 40.3 percent of overall visitation.

The general elementary school aged programming is listed below:

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<sup>50</sup> See [http://www.oldsalem.org/assets/files/map\\_revised2012.pdf](http://www.oldsalem.org/assets/files/map_revised2012.pdf).



- Puppet shows Wednesdays and Fridays in the Horton Center
- Observe Historic Trades: Joiner, Potter, Tailor, Shoemaker, Tinsmith/Pewterer, Gunsmith, Doctor, Gardener.
- Historic Home Life: Quilting, Laundry, 18th Century Games, Coffee Roasting, Hearth Cooking, 18th Century Currency, Candle Making, Butter Churning, Preserving Foods.
- Hands-on activities at the Veirling Barn (Tuesdays and Thursday): Daily Past Life, Historic Schooling, German Art Forms.
- Miksch Garden and House: observe Gardening, Food Preparation and Sustainable Practices.
- St Phillips Heritage Center: The Slave Story, Guided Tours, Exhibits, Hands-On Activities.



Figure 3. Five Yesteryears Camp participant. Image from OSMG.

Other elementary school age programming offered throughout the year:

- “Bountiful Harvest” and other science classes for homeschool students.
- Scouts Day presented for North Carolina Scouts (Boys and Girls) with hands-on activities and demonstrations.
- 3 Yesterdays Summer Camp (grades 1-2): discover the life of children in the 18th century.
- Science Alive: teaching science through history (an Arts Alive program is in development).
- Guided experience tours for school trips

Depending on the time constraints of a visitor, an elementary school patron can either gain a general sense of what life was like for eighteenth-century Moravians, or fully immerse themselves in the information to form a comprehensive understanding of Moravian culture.



Figure 4. OSMG Staff demonstrating domestic skills to young visitors. Image from OSMG.

### **Middle School Education**

Visiting Old Salem as a middle schooler is a hands-on and interactive experience. For middler schoolers, intermingling with the costumed interpreters and volunteering



in demonstrations is common during the general programming. The strategy for middle schoolers is similar to the elementary age and adequately meets state education standards, but during the summer there are more camps offered for the older children.

#### Summer Camps:

- The 5 Yesterdays Camp, grades 3-8 is a week long summer camp teaching about the crafts and lifestyles of the Moravians.
- Apprentice Program I and II (students can complete the first year of camp and return the following summer to advance the skills learned)

These camps serve as a foundation for students to flesh out interests in the history field, an extra-curricular experience they would not otherwise receive in a classroom setting in school.

### **Secondary Education**

As with most museums programming, interaction between students and the museum diminishes in higher grades.<sup>51</sup> While general programming is available, the Apprentice Program is the only special program offered to high school-aged students during the summer. The Apprentice Program offers two weeks of hands-on experience for grades 9 to 11. Attendees complete projects in period crafts and even prepare a full historic meal on the hearth.

On a regular school tour or family visit, high school and college students may be more likely to ask questions or use Old Salem as a site for a school history class paper. There are also opportunities for this age group to volunteer at OSMG in numerous departments throughout the museum. For many years, Old Salem has participated in partnerships with Salem College and the University of North Carolina-Greensboro to conduct archaeological digs. This past summer, archaeologist Dr. Mo Hartley ran a three-week dig with students at the St. Philips children's graveyard in Old Salem. The dig helped uncover archaeological evidence for the church and the museum and provided quality educational experience for the students. The achievements of the secondary education programming are a highlight of

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<sup>51</sup> Willumson, 9.

OSMG's overall educational mission, as not all museums master effective outreach to this age group.



Figure 5. Archeaology dig summer 2012. Image from OSMG.

### **Support for Lifelong Learning**

One of Old Salem's greatest educational offerings is the lifelong learning pursuits for older adults. There are numerous programs for adults covering a variety of subjects offered throughout the year. Specifically, Horticulturalist Martha Hartey is very active in her outreach to the garden community and hosts numerous events a month during the garden season.

- Garden Workshops: Herbal First Aid, Introduction to Beekeeping, Practices & Tips from Historic NC Gardens, Seed Saving, Fall Lawn Care, Herbal Tea Making, All about Lavender, Native Plants for Triad Gardens, Today's Special Chestnuts, Cooking With Herbs.
- Historic Trades: Make a Linen Shirt, Make a Pewter Spoon, Create a Custom Powder Horn, Make a Hearth Broom, Make a Leather Folio, Slip Trail Pottery.
- Historic Home: Holiday Hearthside Baking.

The adult programs acquaint visitors with trades, domestic life, and gardening



Figure 6. Hearthside cooking class. Image from OSMG.

techniques of the Moravian culture. For participants, the motivation for enrolling may be a connection to their Moravian identity or learning about the culture of the area they recently



Figure 7. Students as the MESDA Summer Institute 2011 examine a museum piece. Image from OSMG.



moved to. Another major program for older adults is the MESDA Summer Institute, which attracts graduate students and museum professionals for a three-week program to study early decorative arts and materials. Each year the program rotates its regional concentration between the Tidewater, the Low Country, and the Backcountry. In its 36th year running, the program hosted 15 students in summer of 2012. The attendance numbers are average for the program and similar to competing programs at other institutions.

### **Preservation Staff and Resources**

The staff at Old Salem and MESDA give back to the community by contributing to the preservation and museum field frequently through presentations, volunteerism and scholarship. Traveling to lectures, meetings and conferences to present is common as nearly once a week, a member of the staff is lecturing off-site.

Recently staff visited:

- Winston-Salem Kiwanis Club
- North Carolina Philanthropy Conference
- Preservation North Carolina
- Daughters of the American Revolution

Additionally, the interpretive staff at OSMG on a regular basis through scholarship and volunteerism. Historic Gardener Chet Tomlinson recently published an article in the Yakin Valley Living magazine on the sustainable organic heirloom gardens at the Miksch Gardens and House in Old Salem.<sup>52</sup> Additionally, David Bergstone published *Images of Old Salem: Then and Now* in 2010 illustrating the restoration process. The participation in lectures and publications is not required by staff contracts, instead there is a culture at OSMG of sharing expertise. Many OSMG employees serve on executive boards of other history or museum organizations which further enhances staff connections with the community.

### **Conclusion**

The education category is likely the easiest category for a museum to self-evaluate, as

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52 Chet Tomlinson. "Miksch House and Gardens." *Yadkin Valley Living*, (May 2012), 56.

gauging learning outcomes has been prominent in the field for decades. In this study, Glenn Willumson's educational indicator framework directly inspired the procedure for taking inventory of the educational programming at OSMG. However, building off of the Florida study, it is important that this thesis reviewed how many of these educational programming opportunities are mission related but not intentionally designed educational enhancement. Particularly in the secondary and lifelong learning categories, are these programs designed to achieve a certain outcome? There are no state educational standards for these age groups. As museums continue on the process of long-range planning for sustainability, it is vital that they understand the impetus behind each program, its outcomes, the benefits, and what the implications of reducing the program may be.

At Old Salem, elementary education is well-crafted and undoubtedly contributes to an increase in citizen well-being for the community. Other educational indicators, such as the contributions of the preservation staff to local non-profit boards, which unofficially, are less clear on how they impact quality of life. To combat this, establishing standards and goals for each educational indicator is an essential next step. Furthermore, taking inventory of every educational program, not just the popular ones, is important. If a program is not on the table, it cannot be reviewed.

## Community

The positive effect of museums on the quality of life in their communities is widely assumed in the museum world and the general public. As stated previously, the argument is straightforward for education, but more the subjective subjects included in the community category lack such substantial studies demonstrating the positive claims. The community indicators are aspects of museum-community interaction that impact citizen well-being.<sup>53</sup> Much of the inspiration for this section came from Burton & Griffin, Stone, Reeves, and Phillips. For these scholars, measuring social impacts means understanding the factors of social value, community pride, and other audits to provide a holistic answer.<sup>54</sup> These are often intangible values that may or may not have a direct measure. However, it is clear

<sup>53</sup> Willumson, v-7.

<sup>54</sup> Burton and Griffin, 2.

through this research that subjective measures have an objective value in the overall evaluation of quality of life in relation to museums.

Museum Community Indicators:

- Social Capital
- Civic – Museum Partnerships
- Regional Identity
- Public Awareness
- Working with Government Agencies
- Membership Local Versus Non-Local
- Local Amenities
- Neighborhood Participation

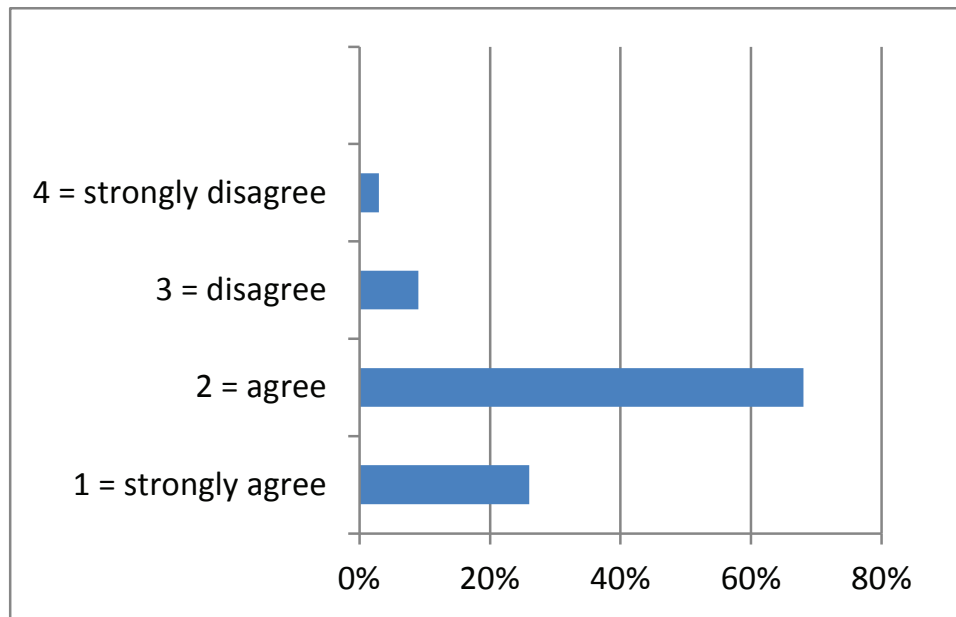
**Social Capital**

One of Old Salem’s most distinct assets is its ability to create and support social capital. The educational programming, special events, and the presence of the historic built environment all provide incentives for social capital. Social capital can be measured in various ways: assessing outcomes, networks, or the quality of connections and the interactions between them. Researcher Wendy Stone suggests a survey method to make inferences about the norms of behavior within networks. As noted by Burton and Griffin, and Stone, “measuring social capital through an individual’s attitudes, beliefs and behaviors more accurately reflects the social capital stock and distribution within a community.”<sup>55</sup> That reasoning served as a primary influence for creating a visitor survey for Old Salem: to try to assess the beliefs and attitudes of museum visitors and community members.

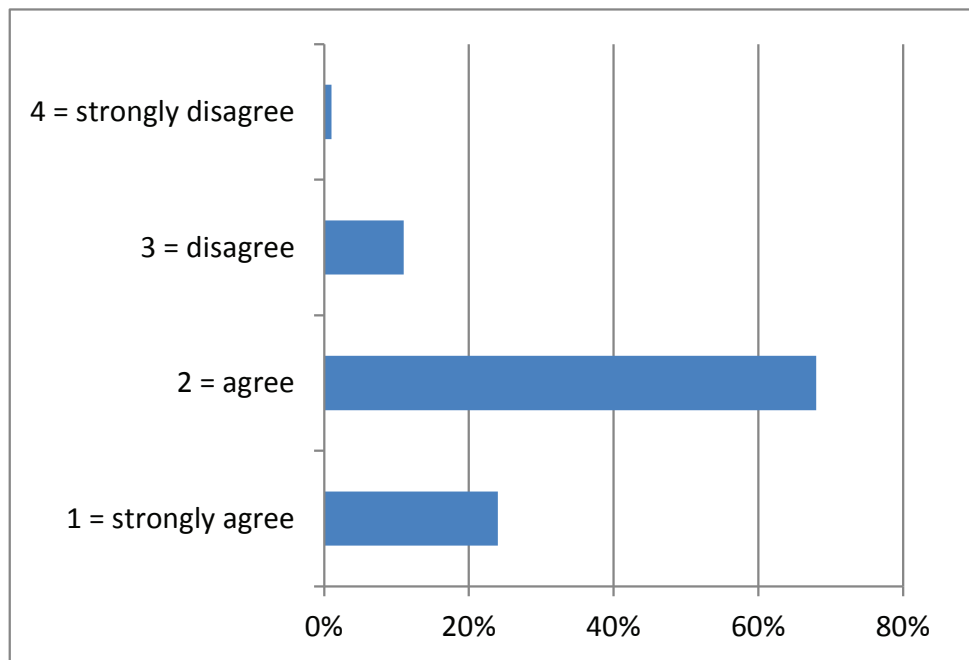
Several questions asked on the Visitor Survey provide an indication of the level of social capital supported by Old Salem. When asked if they felt that “Old Salem helps people develop community and social networks,” on the survey, over 60 percent answered “agree” and over 20 percent said “strongly agree,” (Graph 1). Another question asked, does Old

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<sup>55</sup> Burton and Griffin, 3.

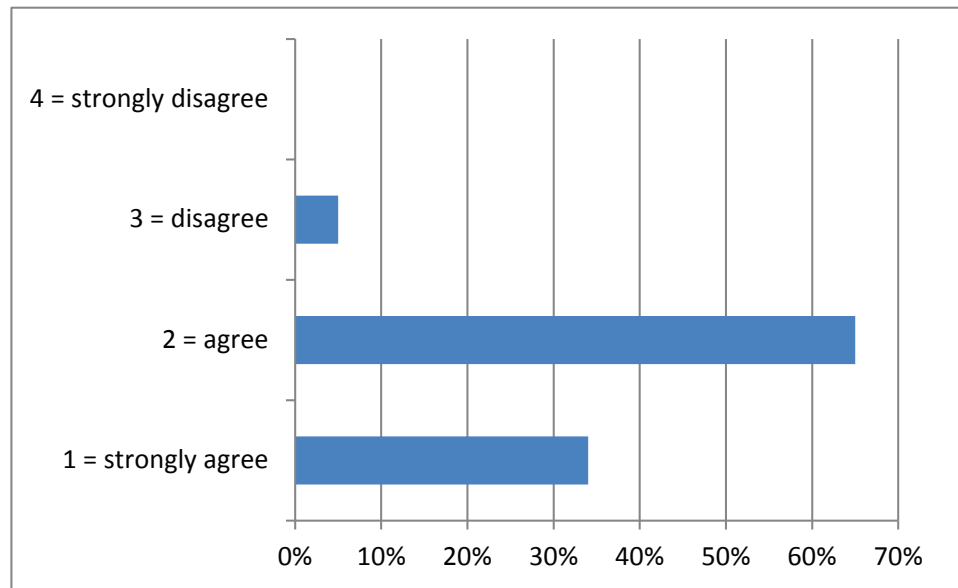


Graph 1. Old Salem helps people develop community and social networks.



Graph 2. Old Salem promotes contact and cooperation across different cultures.

Salem promotes contact and cooperation across different cultures? Again over 60 percent said agree (Graph 2). Then the surveyees were asked if Old Salem promotes contact across different age groups, over 60 percent said agree (Graph 3). The results of the visitor survey



Graph 3. Old Salem promotes contact across different age groups.

indicate that the citizens of Winston-Salem and visitors to the museum value the site for its social capital function. In addition to visitor feedback, the use of costumed interpreters and the make-your-own-path experience of the open-air living history museum further support social capital. In a study by Reach Advisors, the findings suggest visitors prefer an authentic historic hands-on experience which creates a deeper level of engagement.<sup>56</sup>

### **Civic-Museum Partnerships**

Old Salem would not have been established and would not function without its civic-museum partnerships. This variable indicates how much the local community values the presence of the historic site and museum. Since its inception, the museum has partnered with the Home Moravian Church, Salem Academy and College, the Salem Congregation of the Southern Province of the Moravian Church and the City of Winston-Salem to operate. Many of the buildings are owned by Salem Congregation, including the National Historic Landmark Single Brothers House, but maintained and operated by Old Salem.

In particular, the Square at Old Salem is a complex civic-museum partnership that is co-owned and co-managed by the community partners. Different parties in Old Salem take responsibility for various aspects of Square maintenance (fences, trees, firehouse), and

<sup>56</sup> Scott Wands, Erica Donnis, and Susie Wilkening. "Do Guided Tours and Technology Drive Visitors Away?" *History News* (Spring 2010), 23.





Figure 8. Single Brothers House. Image from OSMG.

a cross-organization calendar is utilized for scheduling events. The square is utilized for numerous scheduled and casual educational and recreational uses, from the Naturalization Ceremony and band concerts to African dance lessons and picnics. The museum grounds in general entertain official and unofficial community special events frequently; car shows, festivals and concerts are common programming throughout the year. By selecting Old Salem as a priority event site, the citizens of Winston-Salem have demonstrated time and time again that the neighborhood of Old Salem is worthy of preservation. A recent addition to the civic-museum partnership category is the Old Salem Cobblestone Farmers Market, one of four in the Winston-Salem area. This takes place next to the Single Brothers Garden on Saturday mornings from 9 to 12.<sup>57</sup>

One tricky aspect of the partnerships model is balancing the OSMG sponsored events versus those organized by an outside group. Matters are complicated by the fact that the City of Winston-Salem owns the streets rights-of-way. When outside organizations are scheduling events, they may obtain a permit from the City to close off the streets. Old Salem

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<sup>57</sup> "Farmers markets: 'a great way to build the city'" *JournalNow.com*, August 10, 2012. <http://journalnow.com/ar/2510334/>.



Figure 9. Salem Square. Image from OSMG.  
has no control over the times, location, and specifics, of these events and street closures.  
Old Salem is eventually notified, but the timeline is not always ideal for planning logistics.



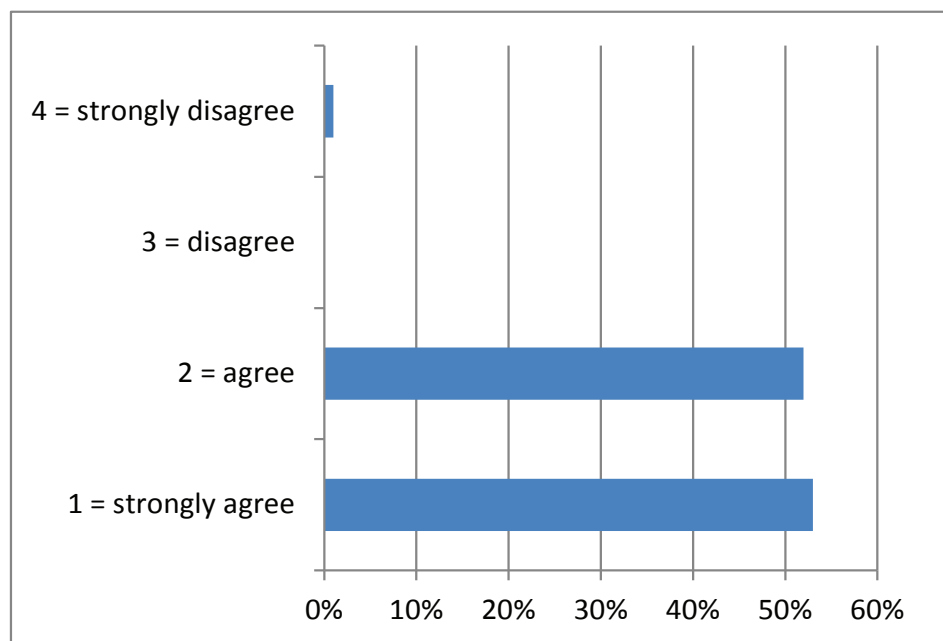
Figure 10. The start of Race for the Cure on Old Salem Road. Image from OSMG.



This often causes OSMG to scramble to arrange operational issues for visitation and impact on residents. For example, when Race for the Cure is happening, Old Salem is essentially shut down to visitors and the residents are trapped as thousands of people make use of the grounds for the special event. In summer 2012 alone, the Farmers Market vendors had to move to a new location three times to accommodate for other events that would completely block off access to the market. The repercussions of this continued recreational use by outside groups is an aspect of museum management and operations that OSMG must monitor closely. While hosting Race for the Cure is a worthwhile endeavor, what are the implications, positive and negative?

### **Regional Identity**

The existence of Old Salem and its connection to current day Moravians and Winston-Salem natives is strong. The presence of the current day Moravian Church plays a large role, but without the preserved town of Salem the imprint on this community would not be the same. The preservation of Old Salem and its community pride qualities are immense. When locals have family members in town, they often take visitors to Old Salem. When officials at



Graph 4. Old Salem contributes to a sense of regional identity.

Baptist Hospital are recruiting new doctors, they tour Old Salem. Jason Thiel, the Director of the Downtown Winston-Salem Partnership said it best with, “we know that in 100 years Old Salem will still be here.”<sup>58</sup> To further substantiate this, a question on the visitor questionnaire asked; Old Salem contributes to a sense of regional identity, and 99% agree or strongly agree. The aptitude of this deeply-routed regional identity is what sets open-air living history museums like OSMG apart from other types of museums or area attractions. Regional identity is one of them any merits of how OSMG contributes positive to the quality of life in Winston-Salem.

### **Public Awareness**

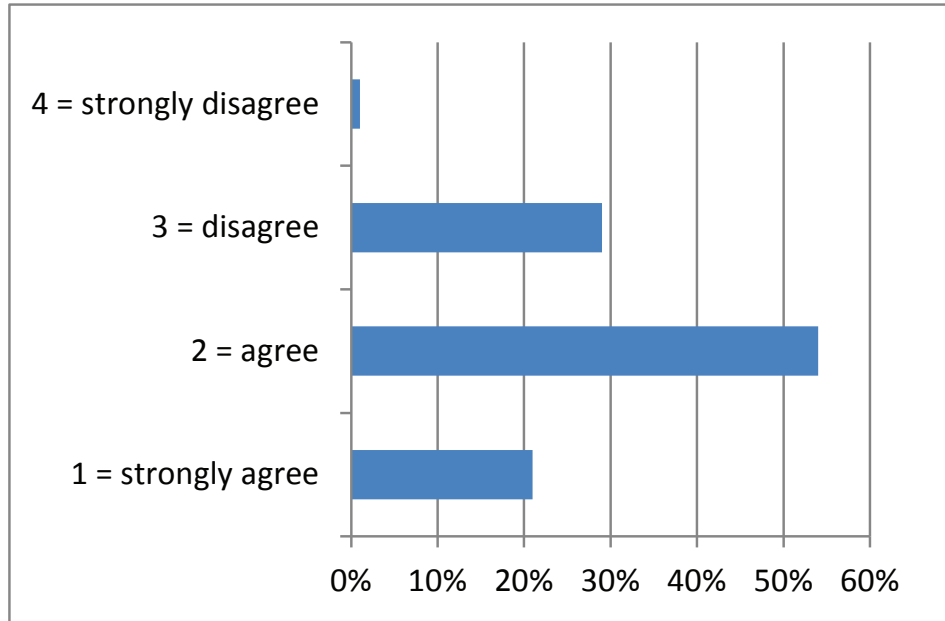
Similar to regional identity, the public awareness indicator demonstrates the influence of the museum in the region and nation-wide. It is apparent from observation that the Old Salem name is big in the Triad area and around North Carolina. While not everyone fully comprehends what the museum is or does, many in the region recognize the name. Those in the Moravian community in particular are aware of the museum and its heritage. However, citizens who share no affiliation with the Moravian religion and are not from the area are less likely to recognize the name. Furthermore, Nationwide, Old Salem has and will continue to fight a name recognition battle with Salem, Massachusetts.

To test the public awareness and name recognition at Old Salem, several questions were pointedly phrased on the visitor survey to gauge the indicator. When asked, “Everyone in the community knows about Old Salem Museums & Gardens,” about 50 percent said they agree. Only 20 percent said strongly agree. Marketing campaigns and social media are a large part of making others aware of OSMG and its value to the community. Demonstrating the public importance and valuation through public events is a growing trend. Hosting non-mission related events to such as the BMW Car Show are a great method for Old Salem to reach out to affinity groups that normally would not choose to visit a historic site.

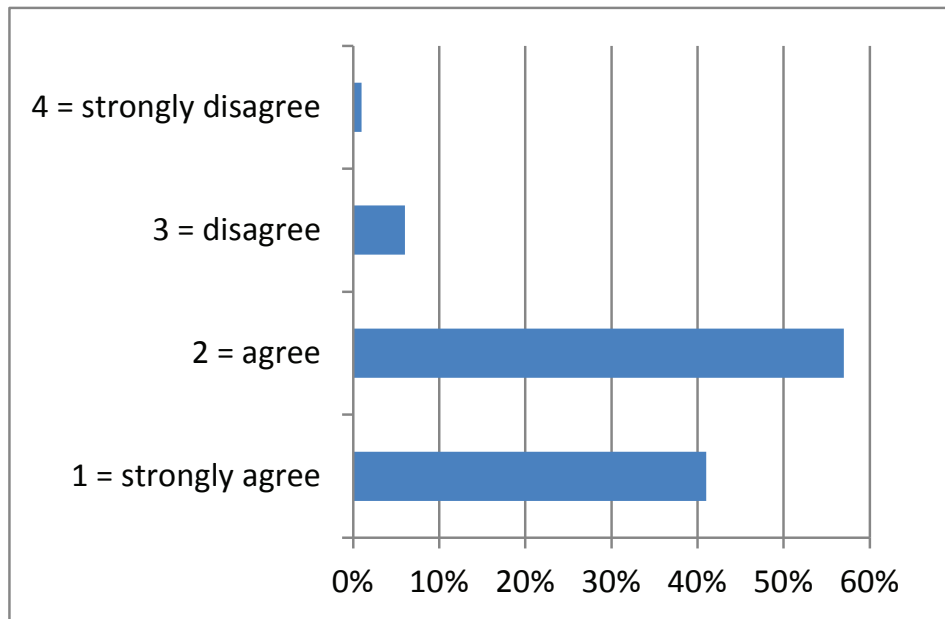
Furthermore, carrying the conversation about Old Salem further, the visitor survey asked about valuation as well. When asked, “Old Salem is important to me...” nearly 60

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<sup>58</sup> Jason Thiel, personal interview, June 27, 2012.

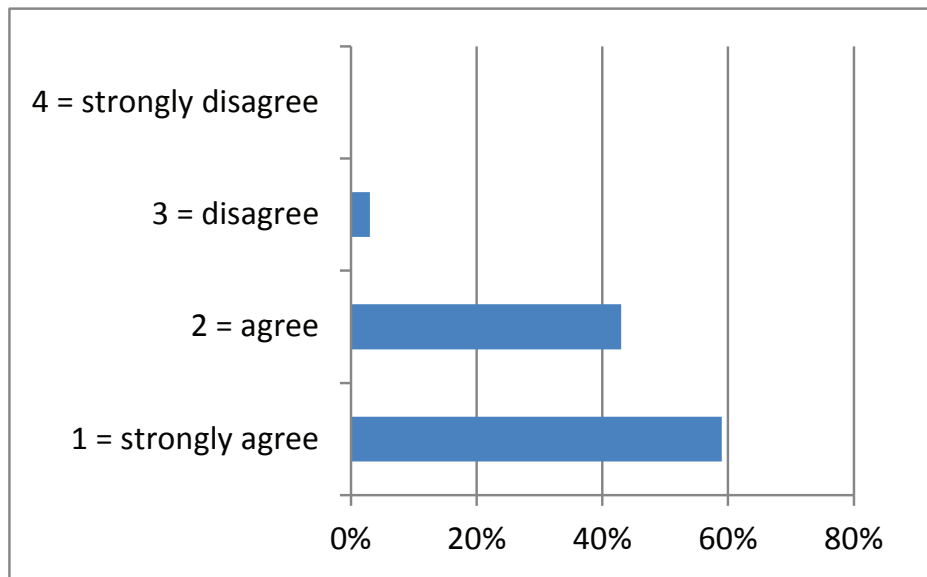


Graph 5. Everyone in the community knows about Old Salem Museums & Gardens.



Graph 6. Old Salem is important to me.

percent said agree, very few disagreed. When asked, “Old Salem is important to the people of Winston-Salem,” nearly 60 percent strongly agreed (Graph 7). This variable demonstrates the firmly established reputation of Old Salem in Winston-Salem. Those who are aware of Old Salem value it; however, improvements can always be made to inform others about the



Graph 7. Old Salem is important to the people of Winston-Salem.

site whom are currently unaware of its merits.

### **Working with Government Agencies**

Old Salem owes its existence to crafty planning and zoning agendas carried out by supporters and museum founders in the 1950s and 60s. When created in the 1950s, the site was a run-down commercial strip long forgotten by most. To combat this, the zoning was changed to residential to protect the area.<sup>59</sup> Today, Old Salem Museums and Gardens works directly with city officials on matters of planning, zoning, signs, events, and other various land use laws. Specifically, the City and OSMG work in partnership to enforce design guidelines for the locally designated H district. As aforementioned, any community can utilize the streets which are a public right-a-way. The City also utilizes OSMG for “Community Days” where the City compensates OSMG to open the museum free of charge to the general public for a special day. OSMG will participate in the upcoming Centennial celebrations of the merging of Winston and Salem through a detailed partnership with the City.

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59 David Bergstone, *Images of Old Salem: Then & Now*, (John F. Blair, Publisher, 2010), xii.



Figure 11. Planning Old Salem, (l) Frank Horton and architects. Image from Digital Forsyth.

The relationship between the City and Old Salem is cordial, but the incredible influence that Old Salem used to have with the City officials has faded. One area of contention is the Winston-Salem-Forsyth County Tourism Board, which administers the lodging tax fund. Other sites in the area, such as the Coliseum, associated with Wake Forest University, receive a direct portion of the tax. OSMG is not so lucky, and is included in a group of local tourism sites which receive a small amount of funds through the Tourism Board. In the future, fighting for more tax dollars and receiving a direct cut of the tax are a priority for OSMG. Utilizing reports like this one, the organization may better demonstrate their value and impact on the community to public officials.

## Membership Local versus Non-Local

This variable tries to answer the question, “how far does the Old Salem influence reach?” indicating the breadth and depth of Old Salem’s support in the local community and nationwide. Overall, the majority of donor support comes from the Triad region of North Carolina and in-state. OSMG’s Development Department has established numerous programs for membership, a Friends of OSMG, Friends of MESDA, Friends of the Gardens, and recently added a Business Friends of OSMG. The ability to bring visiting family members to Old Salem is a convenience that many locals take advantage of through the Friends of Old Salem membership program. Interestingly, the Friends of MESDA has a larger membership base nationwide than Friends of OSMG, as the early American furniture affinity group spans America (Appendix A3).



Figure 12. New Benefactors event in the Single Brothers Garden. Image from OSMG.

As a membership based organization, OSMG is inherently connected to their supporters. Changes in management decisions could increase or decrease the membership numbers. Therefore, tracking membership numbers and gauging the effectiveness of the Friends



Of programs is an essential task. Sustaining a responsive and local support network is incredibly vital to open-air living history museums, as these groups represent repeat visitors and those more likely to volunteer and attend events. While capturing a portion of the traveling heritage tourist is important, maintaining the membership network of individuals, families and businesses that are willing to invest time, effort and money into OSMG should be continue to be a top priority.

### **Local Amenities and Shops**

Old Salem is and will continue to be a small business incubator.<sup>60</sup> Currently, several small businesses related to heritage tourism are open in Old Salem including:

- Winkler Bakery (historic shop where bakers cook with 18th century methods and recipes)\*
- Moravian Book & Gift Shop\*
- T. Bagge Merchant & Garden Shop\*
- Horton Center Museum Shop\*
- Butner Hat Shop\*
- Old Salem Candy Shop and Market Place\*

Places to eat in Old Salem include:

- Winkler Bakery\*
- Mayberry's Restaurant
- Old Salem Candyshop and Marketplace\*
- The Old Salem Tavern

Stay:

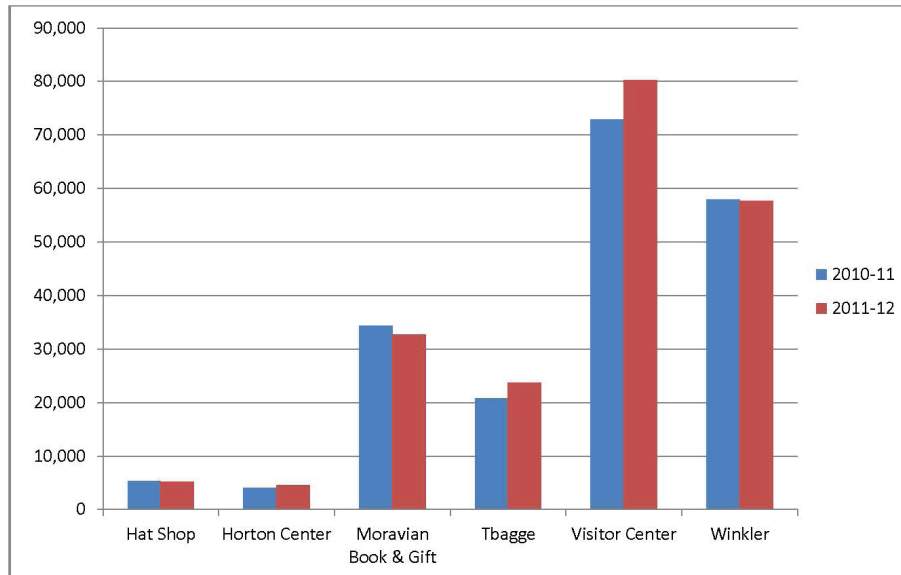
- Augustus T. Zevely Inn

This mix of businesses and restaurants creates a small shopping destination. Of the OSMG operated amenities, the shops at the Visitors Center receive the most business with the Winkler Bakery coming in a close second (Graph 8).

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A discussion of amenities in Old Salem cannot overlook the struggle to reach a balance

60 "\*" businesses are ones owned and operated by OSMG.



Graph 8. Number of retail transactions at OSMG shops in 2011-2012.  
Data from OSMG.

for the site as a museum and as a neighborhood. Compared to other open-air museums, such as Mystic Seaport, OSMG has numerous supplementary amenities. While Colonial Williamsburg tops the list of amenities at an open-air museum with 44, the large scale of the site is the main factor. If Old Salem is compared to a community serving urban neighborhood, the amenity list falls short of expectations.

Currently, the zoning classifications set by the City severely limit future growth in economic development in the area. In the 1950s, OSMG planners and supporters, and city officials made the decisions to zone the area residential, preventing the prevalent commercialization of the area in the early-twentieth-century. While OSMG and neighborhood residents are appreciative that the zoning regulations have blocked unwanted business development, the decision has left the number of amenities in the neighborhood stagnant. Presently, most of these businesses cater to tourists and not the residents of Old Salem, the college students, or the church-goers. Furthermore, the calls for additional neighborhood serving businesses, such as a coffee shop, are increasingly getting louder. These appeals come from OSMG employees, Board members, Salem College officials, and community members.

As Old Salem continues on its track to make the district a better place to live and

visit, adding places to shop and eat will become a priority. The introduction of additional neighborhood serving businesses would receive a warm welcome in Old Salem. An important matter to consider however will be the aforementioned balance between a museum and a neighborhood. Will a new coffee shop need to fit with a historic theme? Or will a Starbucks fit in? As the main business influential player, the responsibility of debating these options and recruiting businesses lies with OSMG.



Figure 13. Moravian Book and Gift shop on Main Street in Old Salem. Image from OSMG.

## Conclusion

The variables encompassing the Community category present a challenge to researchers, of effectively combining the variety of qualitative and quantitative measures to inform the data. Based on the data presented on OSMG, the museum exceeds its mission in some variables, and is restricted by the museum's mission in others. In variables such as regional identity that rely specifically on information from the visitor survey, additional surveying and public input is recommended to continue to track this measure. Overall, it is apparent the museum's presence and programming reinforces the incredible positive quality of life influence of OSMG.

## Economic

The most common methods of calculating economic impact for museums as described earlier in the methodology, are the PEIM, Economics Prosperity Calculator and AIM Toolkit. However, the intricacies of open-air living history museums and the economic benefits of the organizations are not sufficiently captured in these broad methods. More in-depth economic indicators are needed to measure museum economic impact both directly and indirectly. Often times, the measurements for these additional indicators are simple statistics that most museums and municipalities gather annually. As a demonstration, this analysis calculates the overall economic impact using the three methods mentioned above, as well as a framework of indicators on more complex economic impacts.

### Overall Economic Impact Methods:

- Input-Output Preservation Economic Impact Model (PEIM) produced by National Park Service and Rutgers University
- Americans for the Arts Prosperity Calculator.
- Economic Value of Independent Museum Sector by DC Research for Association of Independent Museums (AIM).

### Museum Economic Indicators:

- Property Sales Premium
- Homeownership Rates
- Business Partnerships
- Sponsored Events
- Real Estate Player
- Job Creation
- Tourism Impacts
- Farmers Market

## Overall Economic Impact Methods

### PEIM

Downloadable from the NPS, this model relies on the input of initial expenditure by the organization. The model does its calculations and the resulting economic component approximates direct, indirect and induced effects in the fields of jobs, income, wealth and taxes. The results approximate the economic impact of Old Salem on the state economy of North Carolina, listed below.

<b>Total Effects (Direct and Indirect/Induced)</b>	<b>Output (000\$)</b>	<b>Employment (jobs)</b>	<b>Income(000\$)</b>	<b>Gross State Product(000\$)</b>
Private Sector	\$12,699.9	137	\$4,373.9	\$5,204.1
Public Sector	\$64.3	1	\$19.3	\$29.6
Total Effects (Private and Public)	\$12,764.2	138	\$4,393.2	\$5,233.8

<b>Effects Per Million Dollars of Initial Expenditure</b>	<b>Amount</b>
Employment (jobs)	17.2
Income	\$549,145
State Taxes	\$33,163
Local Taxes	\$23,552
Gross State Product	\$654,207
Initial Expenditure in Dollars	\$8,000,147

Table 4. National Park Service Economic Impact Calculator.

### Prosperity Calculator

The Americans for the Arts recently expanded their efforts to educate the public about the economic benefits of the arts and cultural institutions. The economic model calculates total expenditures, full time equivalent (FTE) jobs, household income, and government revenue. The results approximate the economic impact of Old Salem, listed below in Table 5.

### AIM Toolkit

Developed by DC Research for the Association of Independent Museums in the United Kingdom, this model relies on a three level process: 1) tourism impacts, 2) employment

	<b>Total Expenditure</b>	<b>FTE Jobs</b>	<b>Household Income</b>	<b>Local Government Revenue</b>	<b>State Government Revenue</b>
Nonprofit Arts & Culture Organizations	\$8,000,147	294.4	\$6,596,681	\$306,006	\$35,9287
Nonprofit Arts and Cultural Audiences	\$1,670,456	47.4	\$987,791	\$86,112	\$95,032
Total Industry Impact	\$9,670,603	341.8	\$7,584,472	\$392,118	\$454,319

Table 5. Americans for the Arts Prosperity Calculator.

<b>Level 1 Tourism Impacts</b>			
Total Number of Visitors	87,560		
Proportion Local (44%)	38,526		
Adults	48,431		
Children	39,165		
Gross Impacts			
Spend by local visitor	\$18.91		
Spend by non-local visitor	\$63.79		
Average spend	\$23.37		
Gross Visitor Impacts	Number	Amount	Total Impacts
Local visitors	38,526	\$18.91	\$728,526.66
Non-Local visitors	49,034	\$63.79	\$3,127,878.86
<b>Total Gross Visitor Impacts</b>			<b>\$3,856,405.52</b>
<b>Level 2 Employment Impacts</b>			
Number of Full Time Equivalent Employees	141		
Deadweight	.25		
Proportion Non-local (%)	23%		
Leakage ratio	.23		
Displacement ratio	.3		
Multiplier	1.2		
<b>Total Direct, Indirect and induced employment</b>	<b>68.4</b>		
<b>Level 3 Impacts of Spend on Goods and Services</b>			
Amount Spend on goods/services	\$6,708,368.89		
Deadweight	.25		
Proportion Non-local( %)	60%		
Leakage	.4		
Displacement ratio	.375		
Multiplier	1.2		
<b>Total Direct, Indirect, Induced Spending</b>	<b>\$1,207,506.40</b>		

Table 6. AIM Toolkit Economic Impact.

impacts, and 3) impacts of spend on goods and services. The model also takes measures to not over-emphasize results. First, the method utilizes a leakage ratio to account for the proportion of impacts that benefit those outside of the museum's local area. Secondly, a deadweight is applied to realize the impact that would have occurred without the museum's presence. Thirdly, a displacement ratio is applied to estimate the proportion of museum impact elsewhere in the local community. A multiplier is also factored into this method. The results approximate the economic impact of Old Salem, listed in Table 6.

The results of these three broad economic impact assessment tools present a solid foundation for organizations to consider, but not are recommended as the main driver of economic analysis. As the more comprehensive economic indicators illustrate below, open-air living history museums supply economic impacts in numerous expected and unexpected forms throughout the community. Similar to the education indicators, the methods here take inventory of numerous economic factors and their impact on the community.

### **Property Values**

Many sources connect historic preservation to a positive impact on quality of life and evidence suggests that historic designation encourages improvement of neighborhoods and investments both public and private.<sup>61</sup> While property values in historic districts are a debated issue, historic district designation often stabilizes markets and usually increases home values.<sup>62</sup> For Old Salem, the unique presence of museum owned properties located next door to privately owned residences creates a stable real estate market. This solidity avails in the form of a substantial real estate premium for properties located in the Old Salem Historic District. On a price per square foot basis, Old Salem tops the list for historic district real estate in the Winston-Salem area (Table 7).

The average price per square foot in the last 10 years of comparable local designated historic neighborhoods in Winston-Salem is listed in Table 7.

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<sup>61</sup> McLendon, III-6.

<sup>62</sup> See Randall Mason and Brookings Institution. Metropolitan Policy Program. *Economics And Historic Preservation: A Guide And Review Of The Literature*. (Brookings Institution, Metropolitan Policy Program, 2005).



Neighborhood	Average Price Per Square Foot
Ardmore	\$110.88
West End	\$124.81
Washington Park	\$106.30
Old Salem	\$291.19

Table 7. Comparison of Winston-Salem area historic neighborhoods real estate premium.

Overall, Old Salem properties sell for 257% more on a price per square foot basis. According to an area appraiser, Greg Gordon, “people are dying to get into Old Salem and appreciate the controlled environment.”<sup>63</sup> However, there is much more to consider than just market stability and a real estate premium. The number of home sales in Old Salem has been limited, and since the housing bubble burst of 2008 the market remains stagnant. In July 2012, one house of the three homes for sale in the Old Salem Historic District finally sold.



LOCAL AGENTS LOCAL KNOWLEDGE



**427 Main Street**  
**Winston Salem 27101**

**MLS:** 663494  
**Full MLS:** 663494  
**County:** Forsyth  
**Subdivision:** Old Salem  
**Price:** \$449,000.00  
**Agent:** Eva Johns 336-779-9625

c.1841 Bietel-Van Vleck house, reconstructed in 1976. One of the Old Salem's most "livable" homes...elegant staircases, spacious rooms, many bathrooms, great storage, private lot and off-street parking. Home features almost 3000 square feet with cobblestone driveway, stone terrace, Hendrick's cement tile roof and recently installed Trane XL16i HVAC system. Basement boasts playroom with brick floor, built-ins, nice ceiling height and separate office and workshop.

**Type(Kind):** Residential

**Style:** Salt Box

**Built:** 1832

**Total Sq Ft:** 2000 - 2500

Figure 14. A real estate advertisement for a house for sale in Old Salem. Image from Lenoard Ryden Burr.

<sup>63</sup> Greg Gordon, Phone interview, August 1, 2012.



Most people do not associate museums as having an impact on their property values, however, in the case of open-air living history museums and especially ones such as Old Salem are completely integrated into the neighborhood, the museum has consider weight in this category. <sup>64</sup>It is in the best interest of the museum and the citizens of Winston-Salem to continue the extensive upkeep of the Old Salem Historic District. As a regional choice real estate market and as a national choice for certain affinity groups, this indicator contributes significantly to the local support of the museum.

### **Homeownership Rates**

Homeownership rates may not apply to many open-air museums, as sites that are gated or in a rural locale likely do not impact the real estate market in this regard. In areas where open-air living history museums are direct neighbors to private residences, this variable is an additional indication of stability in the neighborhood. A neighborhood with a high homeownership rate is typically more stable socially and financially. In the United States, historic neighborhoods as a whole tend to retain their value and are less susceptible to foreclosures.<sup>65</sup> This variable is important to consider in the case for open-air-living history museums integrated in the urban environment. A higher homeownership rate means that residents are likely to be more invested in the future of the neighborhood in which the museum is located. In Old Salem, the homeownership rate is 49.12%.<sup>66</sup>

Compared to the national average of 66.6% and the NC average of 68.1%, the Old Salem Historic District is slightly low.<sup>67</sup> This lower rate is due to the large amount of institutionally owned buildings spread between OSMG, Salem College and Academy, and the Southern Providence of the Moravian Church who are all significant landowners in the neighborhood. However, most homeowners in Old Salem are significantly invested in the

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64 Lenoard, Curtis. Phone interview, August 1, 2012.

65 Jonathan Mabry, "Benefits of Residential Historic District Designation for Property Owners." (Department of Urban Planning and Design, City of Tucson, 2007), 4, and Donovan Rypkema, "Preservation & Property Values in Indiana," (Historic Landmarks Foundation, Indiana, Indianapolis, 1997), 10 . [http://www.preservationnj.org/site/ExpEng/images/images/pdfs/Historic%20District%20benefits\\_Mabry\\_%206-7-07.pdf](http://www.preservationnj.org/site/ExpEng/images/images/pdfs/Historic%20District%20benefits_Mabry_%206-7-07.pdf).

66 "Homeownership Rate." *Policy Map*, n.d. <http://upenn.policymap.com/mypolicymap>.

67 US Census Bureau. *North Carolina Quick Facts*, n.d. <http://quickfacts.census.gov/qfd/states/37000.html>.

neighborhood; many are former or current OSMG employees, Board Members, or Professors at Salem College. Because of the institutional makeup of the neighborhood, Old Salem may not statistically align with other areas of high homeownership; nevertheless, this is only one measure of neighborhood stability. The combination of institutional ownership in this case combined with little-to-no vacancy, suggests the Old Salem Historic District is an unwavering neighborhood.

### **Business Partnerships**

Nationwide, the “buy local” initiative is growing in popularity and the impacts of buying local are felt economically in the community. As a membership based organization and community serving entity, it is important for OSMG to serve as an example of such local-serving and sustainable business practices. To estimate OSMG’s dedication to local business partners, this analysis reviewed the percentage of goods and services purchased within the Winston-Salem MSA in 2012. Approximately 40 percent of business transaction are local (Appendix A4). The interaction between OSMG and businesses is crucial to the museums’ continued success. As OSMG asks for community support, it is important that the museum demonstrate its dedication to local businesses. This task is further illustrated as OSMG facilitates stronger relationships with its newly initiated Business Friends of Old Salem.<sup>68</sup> For Old Salem, having local business partners is a priority for both efficient operation of the museum as well as ensuring future community support.

### **Sponsored Events**

When it comes to sponsoring events, Old Salem hosts many successful occasions throughout the year and celebrates most major holidays. One recent popular event was the Fourth of July Celebration and Naturalization Ceremony, where 60 new citizens from 38 different countries took the oath to become American citizens. 2012 was the second year that Old Salem hosted a Naturalization ceremony.

Events put on by Old Salem throughout the year are both mission-related and non-mission related. The Naturalization Ceremony is a mission-related event, along with

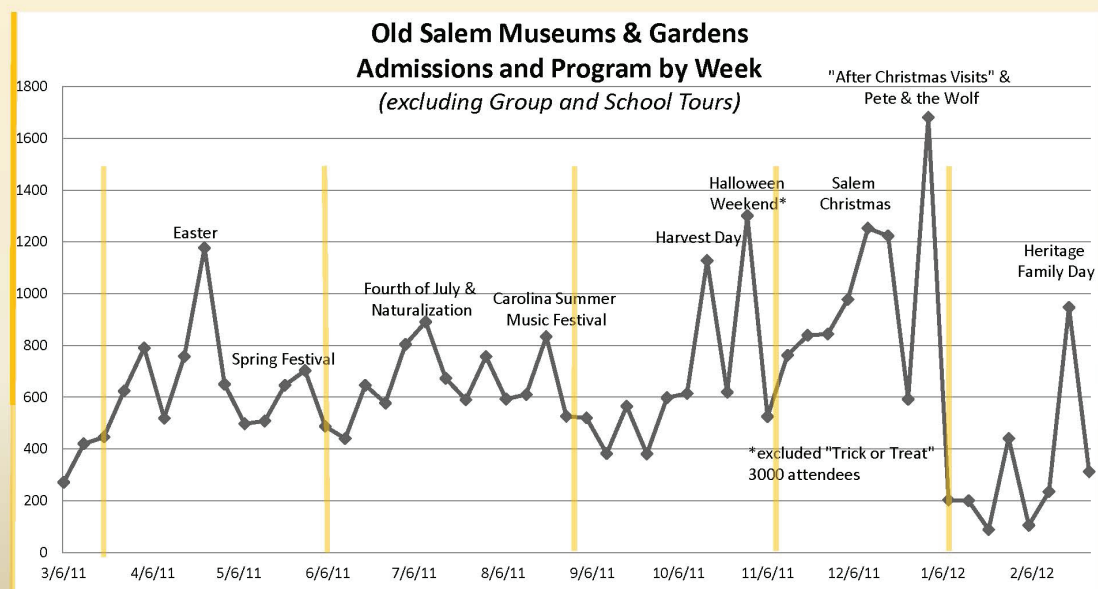
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<sup>68</sup> Old Salem has 12 business friends in 2012 and is looking to expand the program in coming years.



Figure 15. Naturalization Ceremony in July 2012. Image from OSMG.

## Admissions and Program Attendance by Week



Graph 9. Attendance spikes over the year at OSMG. Image from OSMG.

Heritage Days. Other events, such as the BMW car show relate less to the mission of interpreting Moravian history, but attract citizens to visit Old Salem whom normally would not have come. Christmas and Easter events bring the most visitors to Old Salem, topping 1600 admission tickets. Tracking attendance at these mission and non-mission related events is difficult, as currently OSMG only has the capacity to count the number of visitors who purchased tickets. Estimates of how many attend events at the site without touring the museum are unknown.

For the purposes of this study, the sponsored events variable is simply taking inventory of the variety of sponsored events hosted by Old Salem. In the future, undertaking a metric of individual event impact analysis is highly suggested.<sup>69</sup> Often utilized by art museums and festival organizations, event impact analysis will force evaluation of each of OSMG's events, determining if the event is meeting its set expectations for attendance and income and help facilitate any changes in the event structure that may need to occur.<sup>70</sup>

### **Real Estate Player**

In the early days of the organization, Old Salem Museums & Garden was more involved in the real estate scene in the neighborhood. The organization purchased homes, restored them and sold them to homeowners under deed-and-covenant restrictions according to the master plan. Approximately 39 homes are privately owned under Deed Covenants with OSMG, which illustrates the extent to which the museum was previously involved in real estate.<sup>71</sup> Today, OSMG owns 29 buildings, with numerous other landholdings scattered throughout the district (Appendix A5). The museum also leases 12 buildings from either the Moravian Church or Salem Academy & College. Despite its nonprofit status, the organization contributed over \$20,000 in 2011 to the local real estate taxbase.

In the early days of the restoration, some changes to the built environment occurred

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69 See Floris Langen and Beatriz Garcia, "Measuring the Impacts of Large Scale Cultural Events: A Literature Review," (Impacts 08, May 2009).

70 See Floris Langen, and Beatriz Garcia. "Measuring the Impacts of Large Scale Cultural Events: A Literature Review." (Impacts 08, May 2008).

71 Author did not receive a list of deed covenant properties, instead utilized ownership maps provided by the museum to determine which properties are under deed covenant.

rapidly and the implications of this rush are still felt today. These ad hoc choices or decisions to physically relocate buildings without a defined function or dedicated funding has left some buildings in Old Salem without much purpose. The Salt Flax House at 508 Salt Street is one such example of building that does not fit neatly into the OSMG historical narrative and has no specific donor to fund its restoration. With resources used elsewhere, the house has sat unused and vacant in museum ownership for years. Currently, Old Salem's interaction with the real estate market occurs much less, as the organization only interferes when a building is in need or a site is ripe for the protection afforded under Old Salem ownership.

The ability of OSMG to interact in the real estate market and in accordance with the master plan is limited by financial restrictions. In order for OSMG to make positive investment in the real estate in the Old Salem District and surrounding neighborhoods, the organization may need to deviate from the master plan or establish a specific real estate arm.

### **Job Creation**

Job creation is one of those economic valuations that immediately jumps to mind when thinking about a museum's impact on quality of life. Old Salem directly employs 217 people, 114 are part time. Based on a survey of employee zip codes, 80% of employees live in the Winston-Salem MSA (Appendix A6). These employees contribute the local taxbase, support schools and spend money at local businesses. While living locally is not mandated of OSMG employees, the fact that most do indicates how much the employees contribute to the local economy.

Another area to take into consideration is the value of volunteer hours. The Independent Sector estimates the value of the volunteer hour at \$18.80 in North Carolina.<sup>72</sup> Old Salem boasts 160 volunteers who worked approximately 10,000 hours last year. This totals approximately \$188,000 earned in the value of the volunteer hour at OSMG. One of Old Salem's employment strengths is its low turnover rate. Many employees have worked at

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<sup>72</sup> K.S Browning, J.D. Pettijohn, and S. Shaughnessy, "Arts and Economic Prosperity: The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences in the State of North Carolina" (2012), 7.



Old Salem for more than ten years, at all levels of employment. Some employees celebrate 30 or 40 years with the organization. The same is true with volunteers, many tour guides at MESDA have volunteered for years. This continuity in the work force is a very positive aspect for Old Salem.

### **Tourism Dollars**

“When managed properly, heritage tourism benefits both the visitor and the host community.”<sup>73</sup> Old Salem provides a foundation for the heritage tourism industry in Winston-Salem and the Triad region (Appendix A7). A simple Google search of “museums in Winston-Salem, NC” pulls up OSMG first. Methods to measure tourist impacts include the number of visitors, how much they spend, and how long they stay. It is well-known in the museum field that heritage tourists stay longer and spend more than the average tourist.<sup>74</sup>

Last year Old Salem recorded 87,596 visitors (Table 8). These numbers come from direct museum ticket counter sales and complementary tours. Like many museums, the ability to accurately count the number of non-paying visitors is a hurdle OSMG has yet to overcome. Unlike Colonial Williamsburg, Old Salem is not roped off; the streets are completely open to cars and pedestrians to roam freely. While other organizations may grossly over-estimate the number of attendees at a certain event, OSMG has maintained efforts for many years to not overinflate attendance numbers through strict attendance counting.

How much do those 87,000 visitors spend while they visit OSMG and Winston-Salem? Research from the Americans for the Arts demonstrates the amount spent by cultural tourists at events, and this amount shows the spending power of Old Salem visitors is significant in the local economy.<sup>75</sup> Nonprofit Arts and Culture Event Attendees Spend an Average of \$26.64 Per Person (excluding the cost of admission) as seen in Table 9.

According to this calculation, Old Salem visitors contributed approximately \$1.7

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<sup>73</sup> Culver, Pennington-Gray, and Confer, IV-4.

<sup>74</sup> Phillips and Stein, 2.

<sup>75</sup> K.S Browning, J.D. Pettijohn, and S. Shaughnessy, 9.

<b>Walk In Visitors</b>	<b>2012</b>
Adults – Full Price	5,895
Adults - Discounted	10,873
Children	3,834
Other Paid Programs	8,428
Other Free Programs	5,623
Friends - Purchases	894
Friends - Visits	2,874
Complimentary	1,187
<b>TOTAL WALK-INS</b>	<b>39,608</b>
<b>TOUR VISITORS</b>	
Adults - Paid	9,060
Adults - Complimentary	3,597
Children	35,331
<b>TOTAL TOURS</b>	<b>47,988</b>
<b>TOTAL VISITORS</b>	<b>87,596</b>

Table 8. OSMG Attendance records for 2012.

<b>Category of Event Related Expenditure</b>	<b>Resident Attendees</b>	<b>Non-Resident Attendees</b>	<b>All Cultural Audiences</b>
Meals and Refreshments	\$8.74	\$16.62	\$11.19
Souvenirs and Gifts	\$3.46	\$5.54	\$4.10
Ground Transportation	\$1.14	\$6.90	\$2.93
Overnight Lodging (per night)	\$0.20	\$14.96	\$4.78
Other/Miscellaneous	\$2.61	\$5.95	\$3.64
Average Event-Related Spending Per Person	\$16.15	\$49.97	\$26.64

Table 9. Average amount spent by visitors, according to Americans for the Arts.



million to the local economy in 2012. One main reason that counting ticket sales and tracking spending habits of visitors is so important is the County Lodging Tax. Like many municipalities, Winston-Salem-Forsyth County charge visitors every time they book a hotel room. This money is then distributed by the Tourism Board, as aforementioned, OSMG does not receive a direct cut of this tax revenue. However, OSMG may utilize the economic impact of tourists to request a fair share of the tax revenue.

### **Farmers Market**

In 2012 OSMG joined the growing trend of hosting a farmers market on their grounds with counterpart Colonial Williamsburg, by starting the Old Salem Cobblestone Farmers Market.<sup>76</sup> The market encompasses 30 vendors and boasts about 1100 visitors a Saturday. The market was also ranked 11th in the nation by US News and World Report Travel section in 2012. The Farmers market is included as an individual variable instead of lumped in with



Figure 16. Old Salem Cobblestone Farmers Market. Image from Beda Verde Farm.

the business partnerships because it adds a specific benefit to the community. The Farmers

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<sup>76</sup> Liz Weiss, "America's Best Farmers Markets 2012," *US News and World Report: Travel*, [http://travel.usnews.com/features/Americas\\_Best\\_Farmers\\_Markets/](http://travel.usnews.com/features/Americas_Best_Farmers_Markets/).

has incredible potential for both the local farmers and Old Salem in this partnership. Not only does the event provide a scene for local farmers to sell their product and residents to purchase local products, but the venue at Old Salem creates positive publicity for OSMG. Furthermore, the market is quantifiable. In this thesis, an online survey was distributed to the vendors to assess the economic profitability of the market. While only five vendors responded, market has proven to be a worthwhile endeavor for Old Salem to host. As the relationship between farmers and OSMG strengthens, more detailed economic research can be conducted to evaluate the profitability of the market.

## **Conclusion**

As an exercise to illustrate the various economic impacts of an open-air living history museum, the indicators are location-specific to Winston-Salem, North Carolina. However, the author hopes that these variables demonstrate the breadth of economic impact open-air living history museums may contribute to the local economy. Museums do not need to limit themselves to the broad economic impact analysis that only factors in tourism; This analysis clearly shows that museums provide much more.

## Physical Character

Undoubtedly, the presence of the historic built environment in Old Salem adds value to the community. The completely drivable, walkable, bikable neighborhood just down the hill from downtown Winston offers a tranquil environment for citizens to enjoy. Visitors recognize when they see the harvest-colored buildings and half-timbered structures that they have reached their destination. The tangible and intangible characteristics of the historic environment preserved at Old Salem creates a sense of place which contributes to the quality of life in Winston Salem.<sup>77</sup>

### Physical Character Indicators:

- Landmarking
- Design Guidelines

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<sup>77</sup> Willumson, 5.

- Restoration and Property Reinvestment
- Walkability
- Gardens and Landscaping
- Geography and Connectivity

This indicator category is important to measure as a means of defining which aspects of the physical character are important to the community. It also tells what is in-expendable and what impact alterations to the built environment will have on community well-being.

### **Historic Fabric**

The scale of the built environment in Old Salem is one of its distinctive features. People may not be aware of all the rich history, but they can recognize the distinctive architecture and inherently know it is a special place. One of the comments from the resident's survey offers insight into how citizens view the historic town, "I love the old buildings and the fact that there is a whole town of restored 18th and 19th century architecture. It is a truly unique neighborhood."



Figure 17. The snow covered Miskch House on Main Street. Image from OSMG.

Since its inception in 1950, Old Salem Museums & Gardens has sought to accurately restore as many buildings in the district as possible. The district possesses a considerable number of historic buildings: there are 107 historic buildings in Old Salem, 77 are original, 3 were moved into the district, and 27 were reconstructed.<sup>78</sup> Over the years over 150 non-conforming buildings have been removed. This allowed for an un-interrupted historic environment displaying buildings from 1766 to 1861, restoration of the historic gardens



Figure 18. Historic photograph of the First House circa 1766 in the foreground with the Belo House circa 1849 on Main Street in Old Salem. Image from Digital Forsyth.

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<sup>78</sup> Bergstone, xiii.



and archaeological investigations.

A unique physical characteristic of Old Salem is the juxtaposition of the highrise buildings in the skyline of downtown Winston-Salem rising above the trees on Main Street. The contrast is stark, but offers a reminder that the historic environment of Salem is thoroughly preserved within the modern-day city.



Figure 19. Northward view of Old Salem with the downtown Winston-Salem skyline in the background. Image from OSMG.

## Landmarking

The public recognition of the cultural value of Salem is evidenced by the significant landmarking of buildings in the district (Appendix A8). Locally, the area is an “H” zoning district, a remnant of the original 1950 zoning ordinance crafted by the City. This designation controls aesthetic regulations of structures, signs, and permits through the Winston-Salem Historic Resources Commission. The Old Salem National Historic Landmark District encompasses the majority of the district and ranks with other national landmarks such as Philadelphia’s Independence Hall. Furthermore, the Single Brothers House and the Salem Tavern are individually listed National Historic Landmarks which affords these

structures protection in perpetuity.

The careful preservation of these landmarked buildings and district gives the Winston-Salem community something to be proud of. Stamping this area as being of “historic value” contributes to the regional identity of the modern day Moravians and Winston-Salem natives and firmly establishes the site’s importance to visitors.

### **Design Guidelines**

The design controls in Old Salem are extensive and the controls reward the community in the continuity of the place, authenticity of the buildings, and property values. Buildings in Old Salem are afforded two layers of control: the Historic Resources Commission Design Guidelines and the more restrictive Old Salem Design Guidelines. A homeowner wishing to make an alteration is required to go before both Boards. The homes under Old Salem Deed-and-Covenant are wholly controlled, down to methods of trash removal. This double layer of protection is what has and will keep Old Salem in the preserved state it is.

### **Restoration and Property Reinvestment**

The knowledge of historical architecture shared by staff and sensitive restoration conducted by the museum in Old Salem are hugely valuable to the Winston-Salem area. One benefit of the Old Salem District is that it is not stagnant; the environment has and will continue to change as the Museum restores and re-restores the landscape to remain highly accurate to the period of significance. As aforementioned, 39 deed covenant homes. The newly renovated Tavern and the soon-to-be restored Boys’ School demonstrate that OSMG is an impeccable steward of its historic resources.

There is no real estimate of how much money has been invested into Old Salem over the years. Some say the number is between 200 and 500 million since 1950.<sup>79</sup> Whatever the number is, the investments have enhanced the community. The story of preservation in Old Salem is one of success and heralded by Winston-Salemers.

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<sup>79</sup> Nick Bragg, in person interview, July 2012.



Figure 20. Restoration on Main Street. Image from Digital Forsyth.

### **Walkability**

One of Old Salem's greatest strengths is the district's walkable environment, for visitors, residents, and citizens passing through. There is an avid lunchtime powerwalker crowd that makes their way down from the corporate district on 4th Street to loop through Old Salem. Additionally, other parts of the district are engaging to walkers, including the Square, the public gardens, and Gods Acre. Walkscore.com rates the Old Salem neighborhood as 80 on their scale of walkability out of 100, declaring the area "very walkable." This ranks Old Salem as walkable as neighborhoods in many larger American cities such as Washington, D.C. and Philadelphia. Increasingly over the last few years, large walk and run events have been held at Old Salem. The Race for the Cure, the Brenner Walk and Bike Race and soon to be an Undy500 Colon Cancer walk-and-run has brought thousands to Old Salem. These events choose to hold their race at Old Salem over other walkable sites located close by in Winston-Salem, like the Dixie Classic Fairgrounds and the Coliseum.

The scale of the neighborhood makes a difference for residents as well. One stated, "Easy access by walking to EVERYTHING from libraries to banks, from ball games to parks, from





Figure 21. Northward view of South Main Street in Old Salem. Image from OSMG.



Figure 22. Riders around a corner in the Old Salem Criterium, 2010. Image from OSMG.

band concerts (on the Square) to so many programs that one cannot possibly take them all in, from access to the arts to amazing restaurants, from friendly community to opportunities for volunteer service, from walking to church to going back in time (all the village displays/

museums/activities/demonstrations).”

### **Gardens and Landscaping**

The gardens and landscaping are a huge part of the Old Salem built environment. The horticulture program at Old Salem is top notch and truly makes an impact for the authentic historic area. As one resident put it, “The gardens of Old Salem, public & private, are beautiful. Everywhere I look, I see signs of attentive care...The Moravian culture and the horticulture combined with the greenway that runs to Salem Lake add to the ambiance of the historic community.” Through the Horticulture programs, outreach, and Farmers Market, Old Salem is known as a place for heirloom gardening, sustainability, and organic farming. Additionally, the presence of significant gardens and greenery in Old Salem provide areas for physical activity, food production, contribute to healthy urban ecosystems. Research shows that greenspace decreases a person’s health complaints.<sup>80</sup> Maintaining the stock of gardens and greenspace at Old Salem should remain a priority for the organization.



Figure 23. Miskch House Gardens at Old Salem. Image from OSMG.

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80 P.M. Sherer, “The Benefits of Parks: Why America Needs More City Parks and Open Space,” (2006), 16.



## **Geography and Connectivity**

The location of Old Salem is and has been an important factor in history. The site is practically in the center of the City of Winston-Salem, and as the former downtown is well-connected by roads (Appendix A9). The trolley formerly operated along Main Street. When asked what they liked about living in Old Salem, one resident stated, “1. Wonderful neighbors/neighborhood, 2. Living in an historic home and neighborhood, and the associated charm of both, 3. The peace and beauty of the neighborhood in the evening when the museum is closed, 4. Convenience of location.” In modern day, the location of Old Salem suffers from some lack of investment on the outskirts of the district. One nearby neighborhood, Happy Hill, is severely distressed. However, anchored on either side of Old Salem is the North Carolina School of the Arts to the south and downtown Winston to the north. These nodes provide citizens and visitors further reason to venture into Old Salem.

Discussions of geography and connectivity surrounding Old Salem often include topics such as road signs, road direction and ease of access. As the City of Winston-Salem, updates its traffic configurations and access of Business Route 40, the ways of accessing Old Salem may change. The organization needs to keep track of such changes and negotiate with City officials to ensure none of the proposed modifications will adversely affect OSMG. This variable is important for Old Salem to continue to gauge and add to when possible. Improving the gateways and access to Old Salem will give visitors more chances to end up there, whether the trip was on purpose or an accident.

## **Conclusion**

Out of all the indicators, the beautification factors are some of the most important to community members. While beautification is hard to quantify or speak of numerically, the image of tree-lined streets stays with visitors well past their visit to Old Salem and often brings them back to the site again. As an organization, OSMG does right to utilize the historic preservation infrastructure available to them in Winston-Salem. The local designation affords the physical character of Old Salem protection and controls in addition to the National Historic Landmark designation. The physical character category is the most

subjective of all the indicator categories, however, that does not diminish its rank in the quality of life analysis.

## Recommendations

It is clear from this evaluation that Old Salem Museums & Gardens contributes positively to the quality of life in Winston-Salem. The presence of the museum gives meaning to the history of the town and culture of Moravians. The museum provides educational opportunities and social capital, allowing citizens to reconnect with their community and history. The intrinsic value that visitors benefit from after experiencing Old Salem is evident in the amount of community support, civic-museum partnerships and public awareness of the site. The citizens of Winston-Salem recognize that Old Salem adds to their social well-being and show their support through frequent use of museum spaces. Old Salem contributes to the local economy in numerous ways and demonstrates that heritage tourism is an important part of the local economy. The sought after real estate in Old Salem is a testament of the value of impeccable restored historic homes. Not all visitors pay, but the frequency of citizens walking through the streets of Old Salem enjoying the environment indicates the site's value.

The following section presents recommendations from the academic world to Old Salem for how to reinforce their positive impact on the community.

First, **cater to the local community**, as the most effective way for OSMG to retain meaning in Winston-Salem is for the organization to devote more of its efforts towards catering to the local community and less to out-of-town tourists. Increasing local memberships and business partners should remain priorities. Additionally, creating more official internship and mentorship programs with local high school and college students is an easy way to connect to the community.

Second, **create a business officer position** to responsibly handle the growing demand in this area of museum management. For Old Salem, many of their civic-museum

partnerships have been marketed to OSMG, instead of OSMG seeking out the opportunities. However, in recent years, the museum has used its own resources to support outside events, and programs disproportionately to the museums' benefit. Examples such as the Krispy Kreme Festival and the Farmers Market represent instances where OMSG hosted but did not benefit financially equally as the other organization. From a business planning perspective, this is not a good status quo to set. To combat this, establishing a business relationship oriented position whom would be responsibility for ensuring each community event hosted at Old Salem follows certain guidelines and that OSMG does not lose revenue as a result of these events

Third, **create a real estate arm** as increased involvement in the real estate market surround Old Salem is an area that needs to be explored. While venturing into this did not bode well for the Colonial Williamsburg Foundation, Old Salem can learn from their mistakes. Working with the Downtown Winston-Salem Partnership, the hospitals, the universities, will be crucial to these efforts. This does not mean that OSMG should intervene in every property in need, but making a more concentrated effort to invest in the neighborhood surrounding Old Salem will further support and protect the museum.

Lastly, **partner in research and scholarship** with other history organizations and museums in the area. Old Salem's interpretive era goes until 1856, but history did not stop there. Old Salem needs to be a leader in historical scholarship in the Winston-Salem area and bring other smaller organizations into the equation. Currently, nearby sites Bethabara and Bethania are competing with Old Salem for the "oldest Moravian settlement." Instead, this should be marketed as the trail of Moravians. Furthermore, supporting scholarship and research on eras of history that Old Salem does not interpret is important. Partnering with the New Winston Museum, which is located just blocks away from the Old Salem Visitors Center is a simple way of showing professional community support.

## Chapters 5: Discussion

The findings of this study illustrate several key points. First, the museum world in the United States is in need of a cultural change in the area of self-assessment. Continuing on the current status quo is not acceptable and the managers of museums need to reach an agreed upon field standard for self-evaluation. Secondly, the quality of life method is transferable to the museum field. The methodology and its capability to adapt to different locations is particularly useful for evaluating complex sites and scales that encompass open-air living history museums. Thirdly, the pilot study with OSMG indicates the vast benefits and challenges of sustaining and evaluating an open-air living history museum in the twenty-first century. The pilot study demonstrates examples for other museums to consider as they move forward to establish an industry standard for holistic impact evaluation.

All non-profit organizations should seek to understand the impact of the services they provide, but not all museums know how to proceed. Numerous organizations, including the American Association of Museums and the American Association for State and Local History have models for museum evaluation. While this study takes those methods into account, the inherent need for holistic impact studies exists. Carol Scott from Australia does well to present the issues with impact assessment and prove the usefulness of them. Yet, the work of Lynda Kelly and Burton and Griffin demonstrate the need for an agreed upon method. These researchers have justified the need for holistic impact studies and adding to the foundation, researchers Rhonda Phillips and Glenn Willumson illustrate the adaptability of quality of life metrics to historic preservation and museums. While quality of life is a valuation process that different researchers handle in various ways, these aforementioned studies have provided a foundation to employ the multi-methodological techniques for this project. This thesis is the first study to propose a quality of life framework for museum impact evaluation for open-air living history museums in the United States.

An objective of this thesis is to create the overall framework, and the author recognizes that there are numerous ways of measuring each indicator. Further research is encouraged

to determine the most effective way to measure the indicators. In the pilot study, some efforts were more successful than others to measure indicators. Overall, many of the variables are implementable at museums in their current status; however, other indicators may require additional data gathering and interpretation before the indicators are suitable for practical use. Subsequently, a discussion of each category of indicators is presented below.

### Education Indicator Discussion

<b>Education</b>	Elementary Education
	Middle School Education
	Secondary Education
	Support for Lifelong Learning
	Preservation Staff and Resources

Museums have been gauging learning outcomes in education for decades and there are varying methods for achieving these evaluations. Glenn Willumson's study directly inspired the procedure for taking inventory of the educational programming in this thesis. Educational programming evaluation is relatively simple task that many museums already accomplish annually. However, building off of the Florida study, it is important that this thesis reviewed how many of these educational programming opportunities occurred by design and how many are spontaneous. At Old Salem, elementary education is well crafted to reach desired goals, but other programs such as the preservation staff and resources indicator occur more unofficially. Taking inventory of every educational program, not just the popular ones, is important. If a program is not on the table, it cannot be reviewed. As museums continue on the process of long-range planning for sustainability, it is vital they understand the impetus behind each program, its outcomes, the benefits, and what the implications of reducing the program may be. Additionally, tracking attendance for each of the educational programs will also help with financial decisions. Records can ask questions as to if the program can be implemented with less staff, or fewer tours? To what degree will those management decisions affect the experience of the museum? Should advertising



for certain programs be advanced? Particularly in regards to the secondary and lifelong learning categories, are these designed to achieve a certain outcome?

Furthermore, with this indicator, it is important for OSMG to realize the ability of the staff to make meaningful connections with the community outside of the museum. The administration should encourage these unstructured educational programming opportunities.

### Community Indicator Discussion

<b>Community</b>	Social Capital
	Civic – Museum Partnerships
	Regional Identity
	Public Awareness
	Working with Government Agencies
	Membership Local Versus Non-Local
	Local Amenities
	Neighborhood Participation

The community indicators category is one of the hardest for museum practitioners to execute and comprehend as many of the criteria are outside the general scope of museum work. Variables such as social capital, regional identity, and public awareness are hard to measure and are subjective in nature. These variables rely heavily on transferred procedures and skills from other disciplines. A measure such as social capital in relation to museums is a relatively new phenomenon, however, as this study shows, its applicability to museums is significant.

For museums, especially open-air living history museums, the ability to gauge the community indicators effectively is necessary. These indicators inform understandings about the inherent values and benefits of museums. Many times, these variables are not mission-based or explicitly stated in a strategic plan. Yet, these variables are what will sustain the relationship of the museum with the community it is located in for years to come. For OSMG, the museum's to interpret and protect the Moravian heritage for Winston-

Salem makes these variables exceedingly important as this type of heritage does not exist in many other parts of the country. Citizens congregate in Old Salem to connect with this preserved heritage. Measurement of the museum's impact on social capital and regional identity should occur annually. Similarly, this analysis should include ensuring museum management decisions do not infringe upon civic-museum partnerships and or prevent new ones from forming. For instance, what if OSMG was gated? This would make gauging tourism impacts easier, but what would the citizens think?

### Economic Indicator Discussion

<b>Economic</b>	Property Sales Premium
	Homeownership Rates
	Business Partnerships
	Sponsored Events
	Real Estate Player
	Job Creation
	Tourism Impacts
	Farmers Market

As established earlier, the importance of economic impact evaluation is often overstated in the museum world. Economics do not make the entire argument of museum benefits; instead, it is one piece of it. The economic indicators presented in this analysis encourage the museum field to think beyond tourism impacts so as to consider other direct museum impacts like business partnerships and job creation. The challenge is linking the management decisions of the museum to indirect economic impacts, such as property values. Will one change in the interpretation or dates of significance impact property values? These are important questions to consider.

In the case of OSMG, the economic indicators provide a thorough view of areas the museum impacts. In translating the OSMG study to other museums, indicators such as the farmers market may not be applicable. However, the main lesson to take away is: include everything on the agenda.

## Physical Character Indicator Discussion

<b>Physical Character</b>	Historic Fabric
	Landmarking
	Design Guidelines
	Restoration and Property Reinvestment
	Walkability
	Gardens and Landscaping
	Geography and Connectivity

While many open-air history museums claim education to be the main objective, the physical environment and the impacts of visual character cannot be underestimated. The immense pecuniary resources devoted to upkeep and implementation of a master plan to establish and maintain an open-air living history museum is reason in itself to continue evaluating this category. If aesthetics were not important, museums would not take the care it does to maintain the historic building stock.

Likewise, this category helps museums establish need for funding. If the museum can pinpoint certain visual characteristics that have the most impact, resources may be allotted more sustainably. If the community and the museum agree that tree cover is important, than tree maintenance should be a variable. Others characteristics, like maintaining walkability in the historic neighborhood may be of equal weight. These are questions the museum and community should determine in a collaborative process. Moreover, utilizing landmarking and local design guidelines holds the museum and other stakeholders to the same standard which is important for community relations.

### Limitations

As with any research, it is important to discuss the limitations of the project and concept. Limitation factors include the one year timeline of the project and lack of relevant literature and previous studies to provide a foundation for the study. In the future, a longer project timeline is recommended. Additionally, the absence of an industry standard for evaluating museum impacts and specific quality of life measurement methods created a

great challenge for the investigator. In evaluating the framework and concept of the project, several aspects influence the adaptability of the project for future use. There exists the inherent subjective nature of quality of life metrics, as what constitutes “a good life” varies among different people. This limitation influences the aptitude to effectively measure the indicators, for instance, is the array of local amenities in Old Salem sufficient? Is it better to have a bus stop nearby or more parking? These are the types of valuation question which vary by person. In addition, this thesis used quality of life indicators as defined by the investigator. Another way of approaching indicators is through a process of community defined indicators, where the citizens illustrate what is important to them about their community. Likewise, the valuation process with quality of life metrics in some research projects involves weighted indicators. Not all indicators are of the same importance. Is regional identity as important as property values or walkability? The deficiency in previous studies and the year-long timeline limited the ability to weight the indicators.

Lastly, one major question left unanswered is the issue of self-sufficiency. Can this quality of life evaluation method be completed by the organizations themselves, or is an outside consultant required? The author’s intention is that one day the method will be implementable initially by a consultant and subsequently museums will implement the program self-sustainably thereafter. This depends on the capacity of the museum, willingness of the staff to self-assess and allotted resources.

## Implications

The justification for this project lies in its inherent educational and informative values. With a clearer grasp on the influence of the museum, managers can make smarter decisions and funders can be sure of what they are supporting. Self-analysis is a difficult process, but going through the measures to assess impact demonstrates to funders that museums take into account their strengths and weaknesses, both inside and outside the museum. With a museum justifying the extent of its impacts in a multi-dimensional fashion, funders can see how the museum benefits the community in many areas that affect citizen well-being.

Additionally, the educational aspects of this thesis are meant to be carried further. This quality of life framework is a preliminary investigation, researchers and museums are encouraged to take the method and adapt it to museums in their locality. The hope is that in the future this quality of life framework will be utilized much like the metrics in the Global City Indicators Project: where there are certain required indicators used to gauge impact and additional indicators allow for locational variations. A proposed framework for the “required” indicators is included in Appendix D. This program could be housed in the American Association of State and Local History or the American Association of Museums, or even a University research center, who could act as a central communicator and data collector. This thesis is just one of the proposed methods of evaluating museum impact in existence; however, the importance of a holistic study cannot be overlooked. Museums provide vital spaces where knowledge is transferred; likewise, the knowledge of how to effectively self-assess should also be shared.

## **Chapter 6: Conclusion**

Contemporary museum management demands better self-assessment measures than those that are currently in vogue. This thesis demonstrates the possibility of a holistic self-assessment tool for museums to implement. By developing a quality of life framework at a complex location, this thesis provides the foundation for practitioners to explore how they may utilize similar knowledge. This framework has the potential to advance the culture of museum evaluation as it provides museums with the means to identify perceived impacts, understand their reach, and measure progress. The ability to self-analyze is especially essential in the current day as museums are forced to sustain operations with less money and less public support. Using this methodology, museums will have the ability to self-assess and make necessary internal and external changes to demonstrate their impact on the quality of life community in which they are located.

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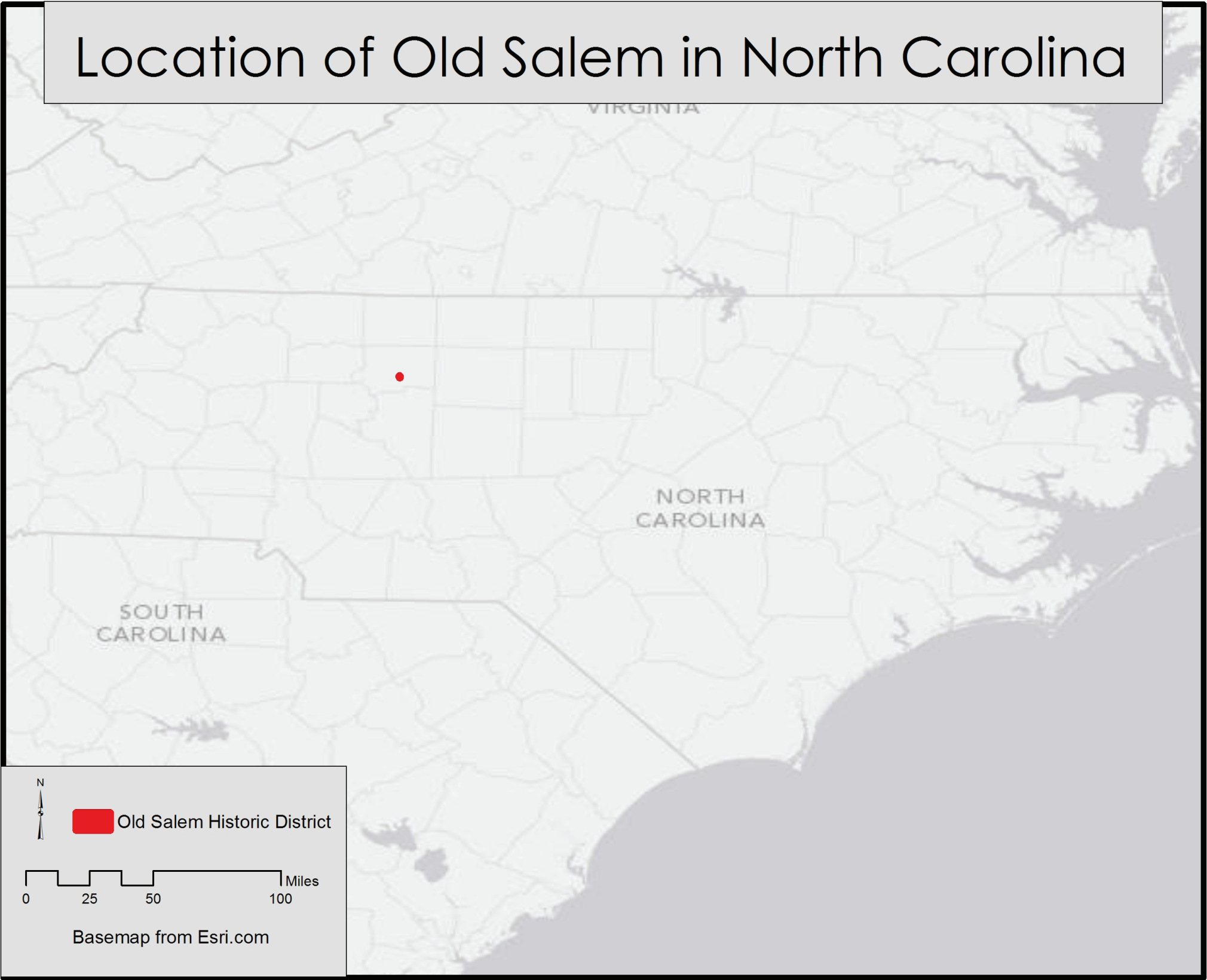
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## **Appendices**

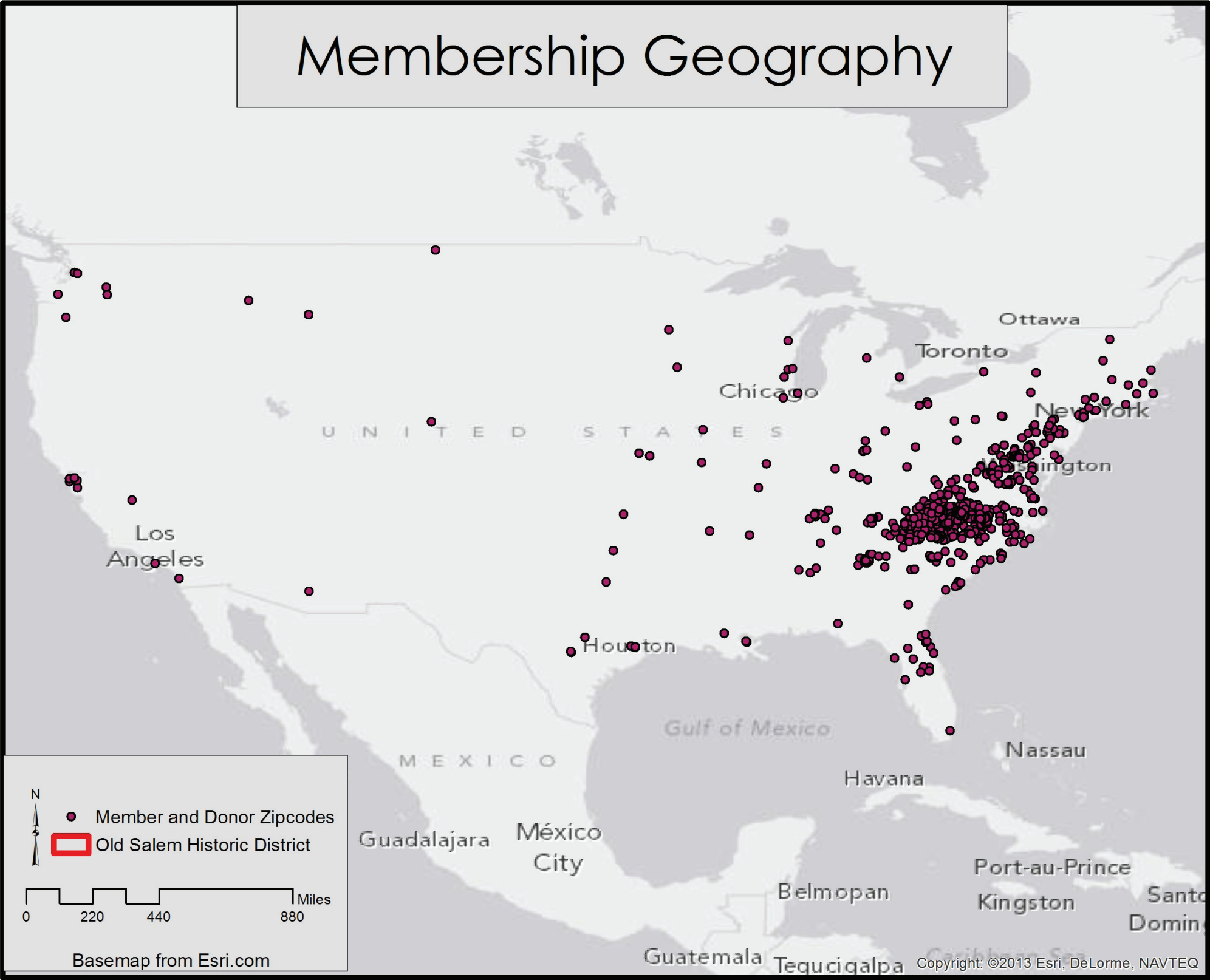


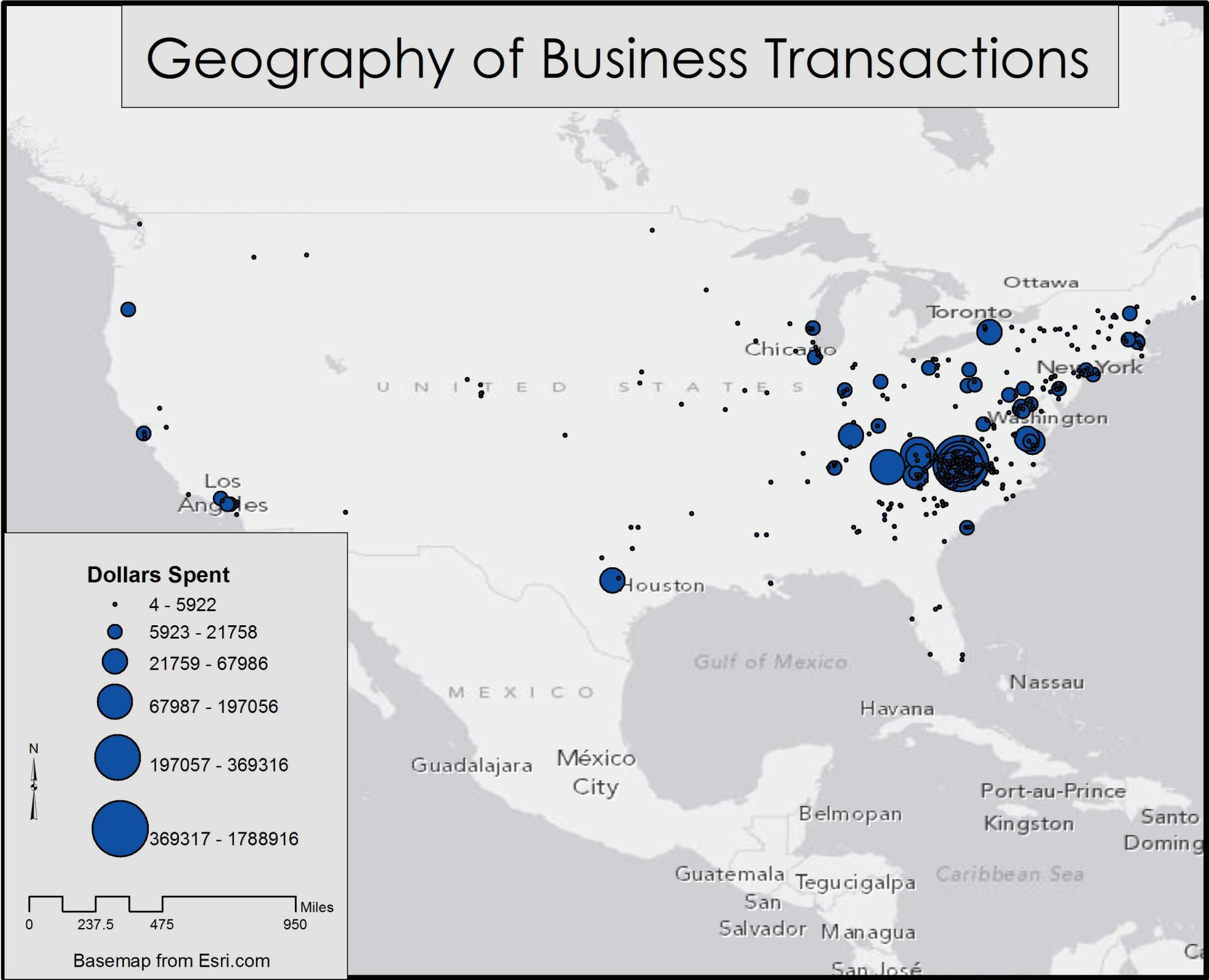




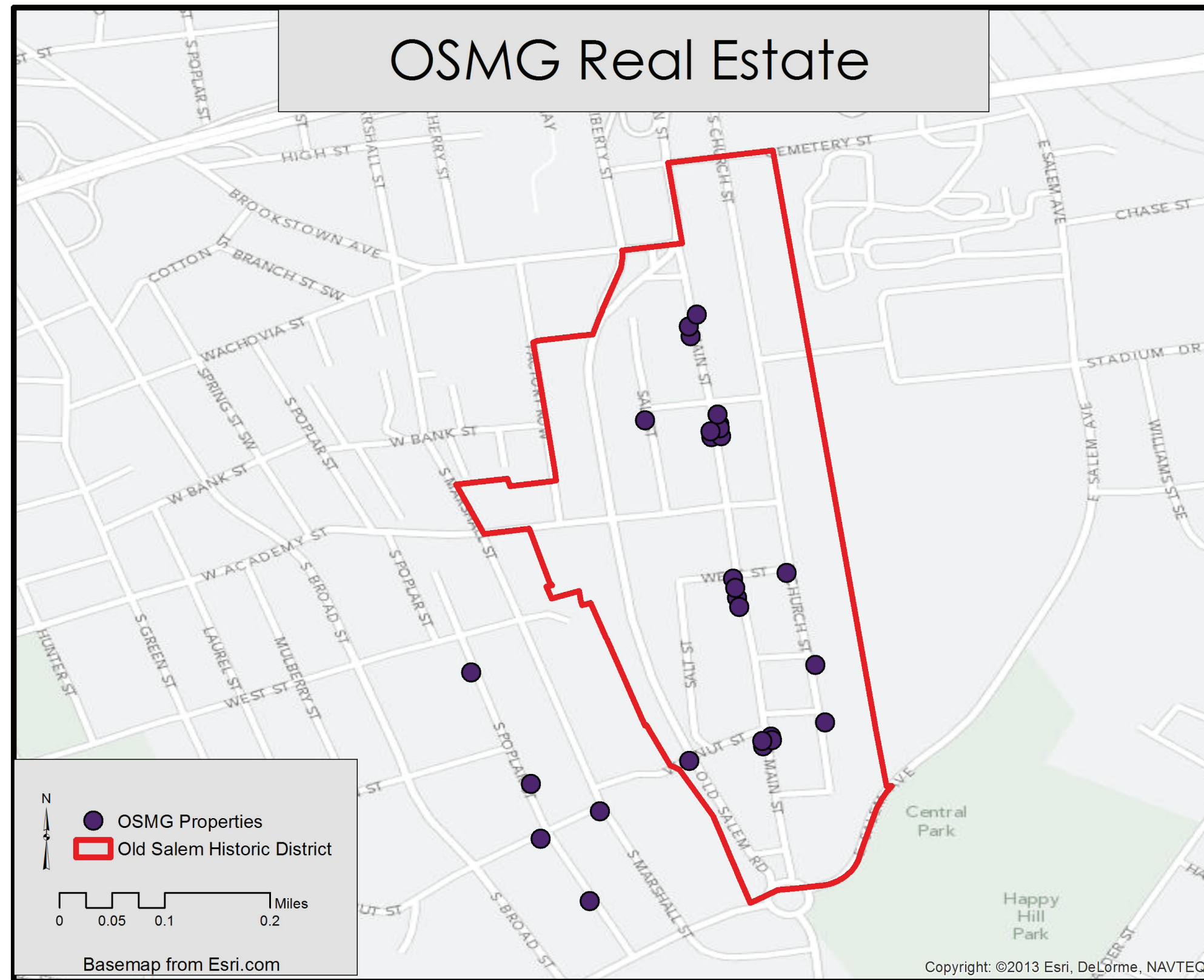




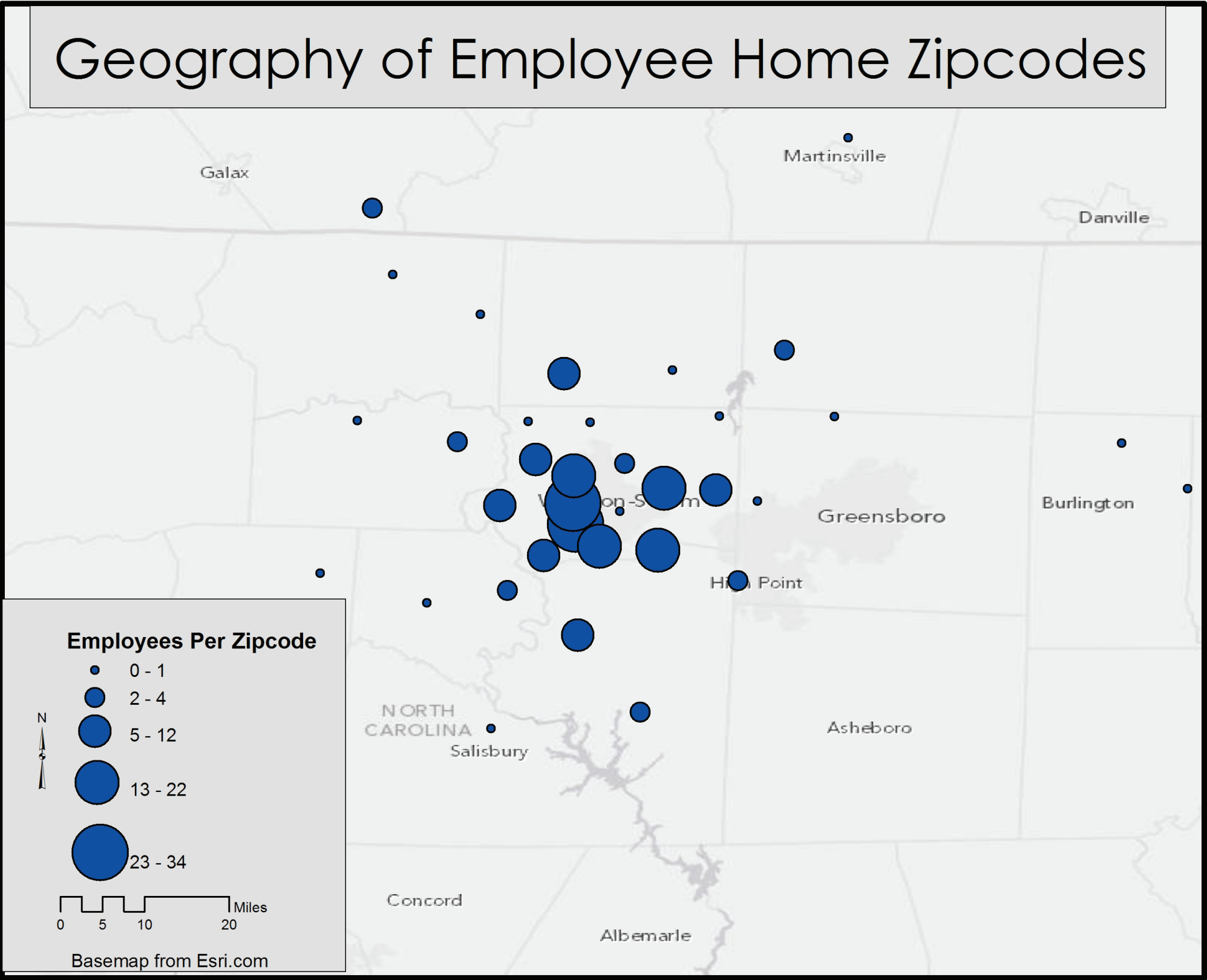




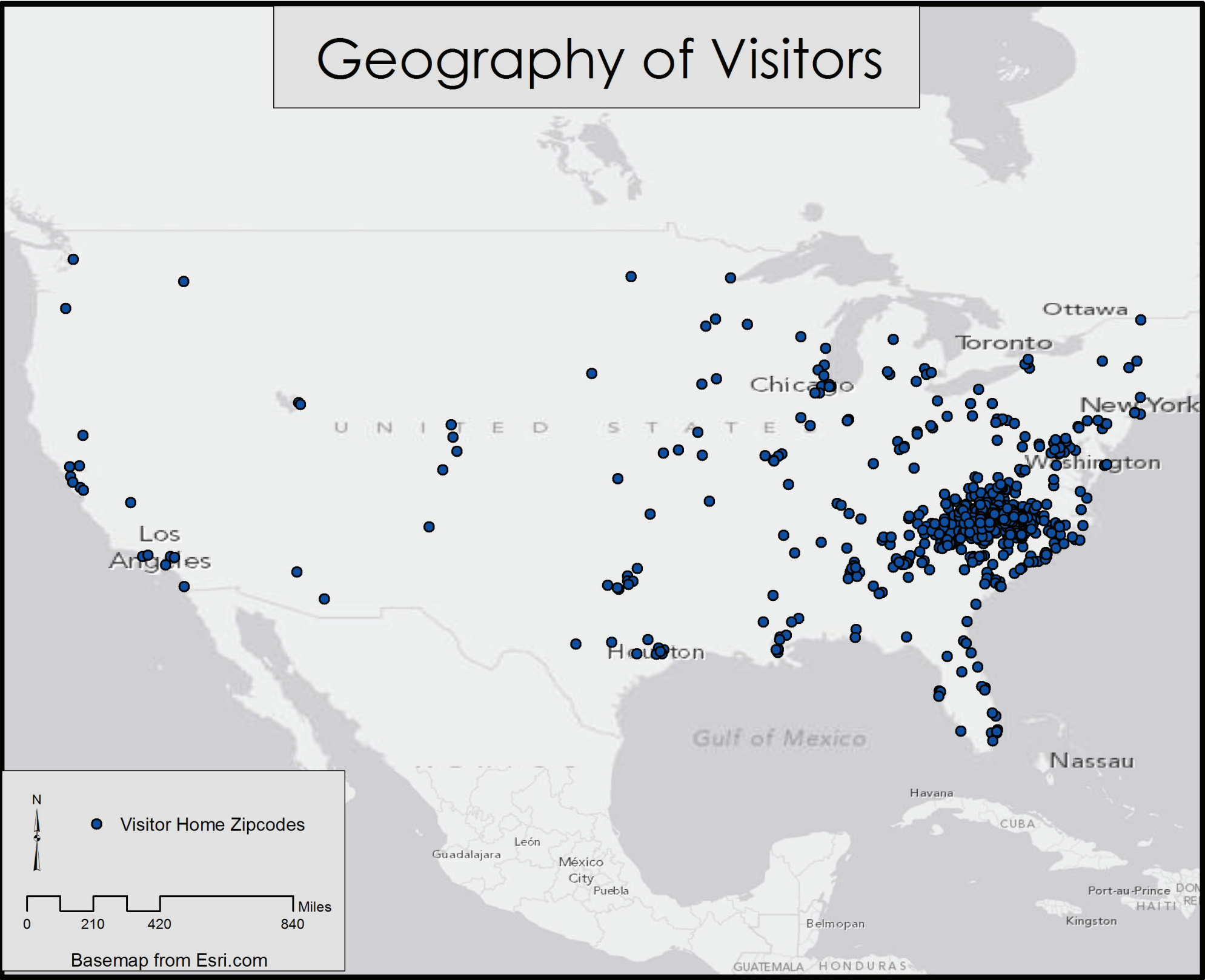
## Appendix A5: Old Salem Real Estate

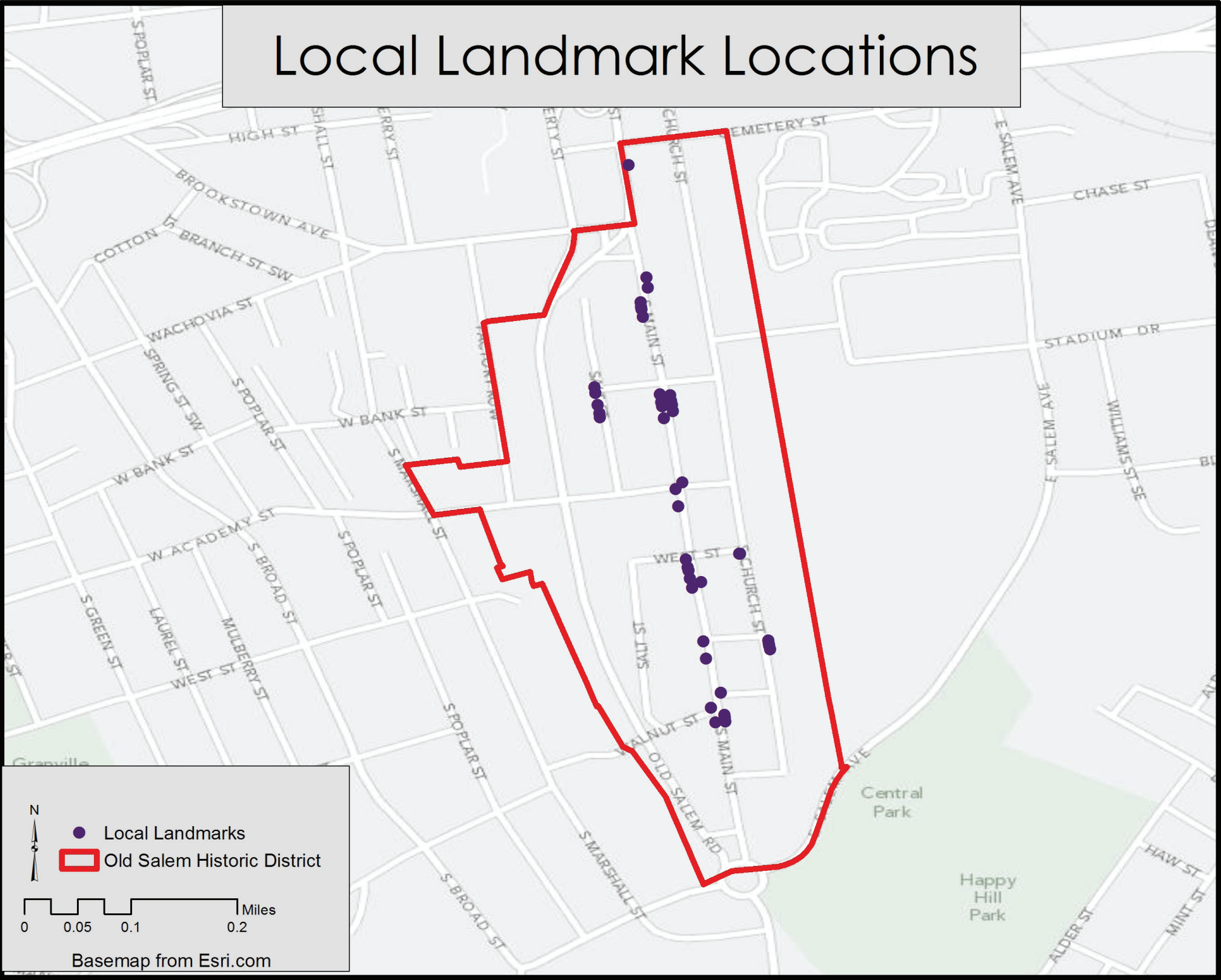


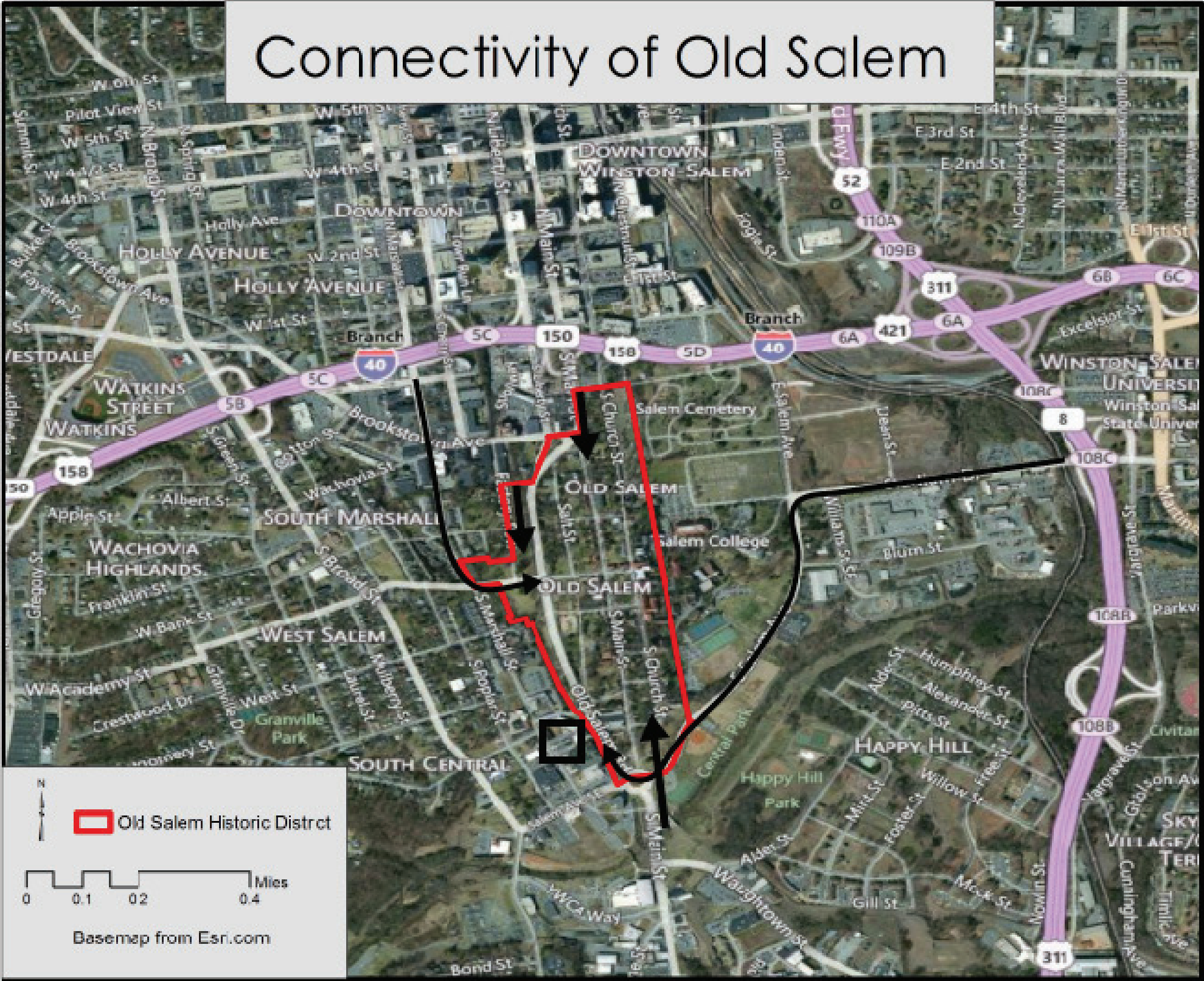










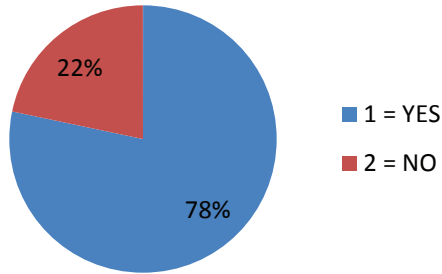


## Appendix B1: Visitor Survey Results

1. Have you visited a historic site or museum in the last year?

- ☐ Yes  
☐ No

***N = 106***

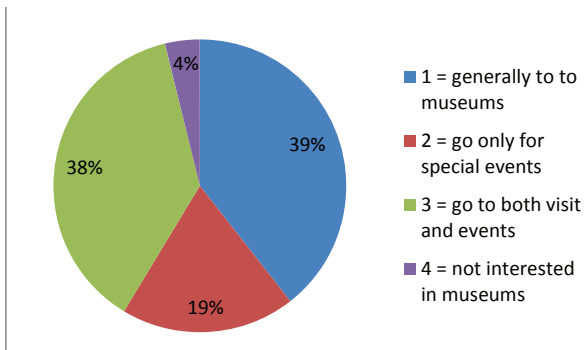


*9999 = No Data, or surveyee picked more than one choice.*

*Raw Data Numbers*

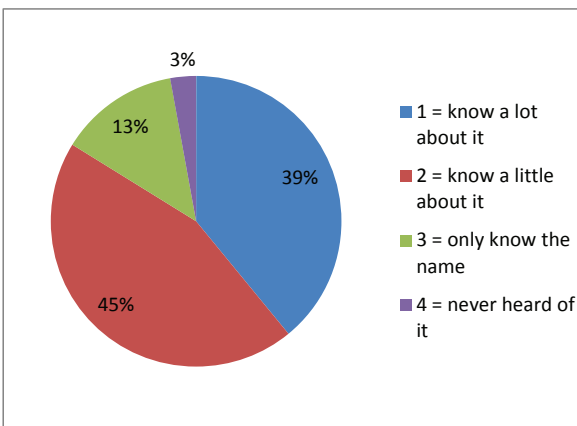
1 = YES	83
2 = NO	23

2. How would you describe your personal interest in museums?



1 = generally to museums	41
2 = go only for special events	20
3 = go to both visit and events	39
4 = not interested in museums	4
9999 = 2	

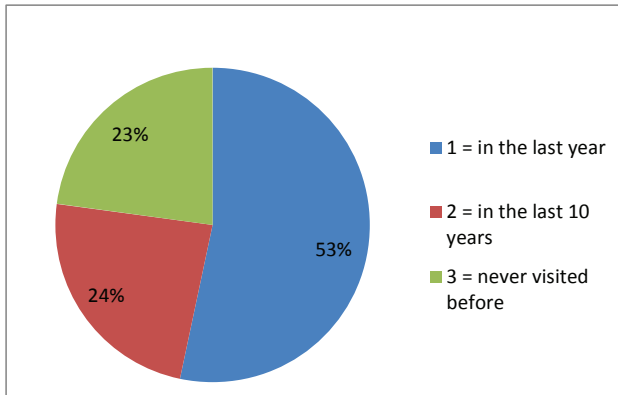
3. How well do you know Old Salem?



1 = know a lot about it	41
2 = know a little about it	47
3 = only know the name	14
4 = never heard of it	3
9999 = 1	



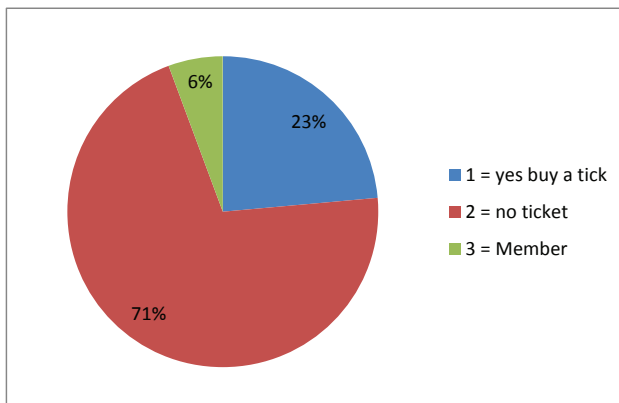
4. When was the last time you visited Old Salem before today?



*Raw Data Numbers*

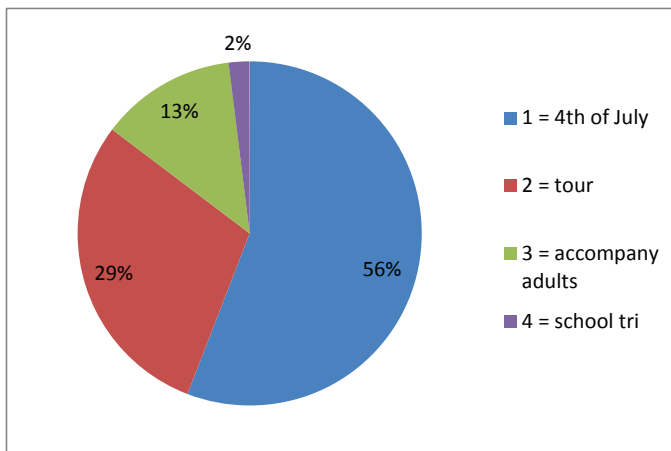
1 = in the last year	56
2 = in the last 10 years	25
3 = never visited before	24
9999 = 1	

5. If you go to Old Salem, do you purchase a ticket?



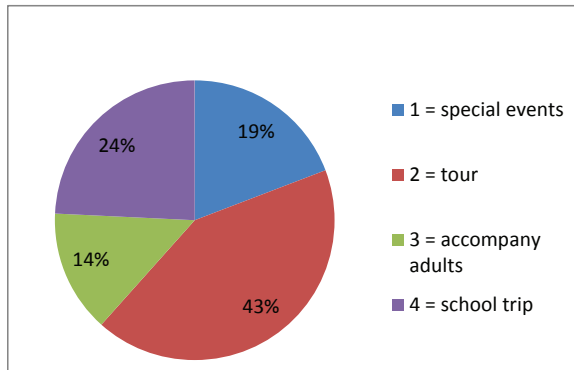
1 = yes buy a tick	25
2 = no ticket	75
3 = Member	6
9999 = 0	

6. What is the purpose of your visit to Old Salem today?



1 = 4th of July	57
2 = tour	30
3 = accompany adults	13
4 = school trip	2
9999 = 4	

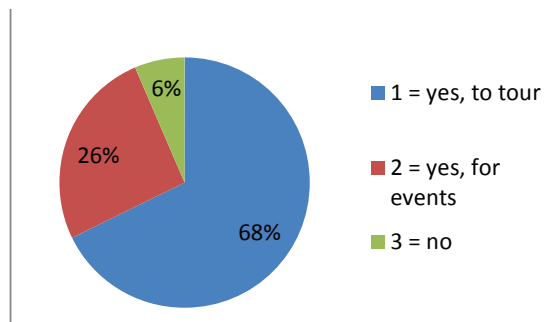
7. If you previously visited Old Salem, what was the purpose of your visit?



#### Raw Data Numbers

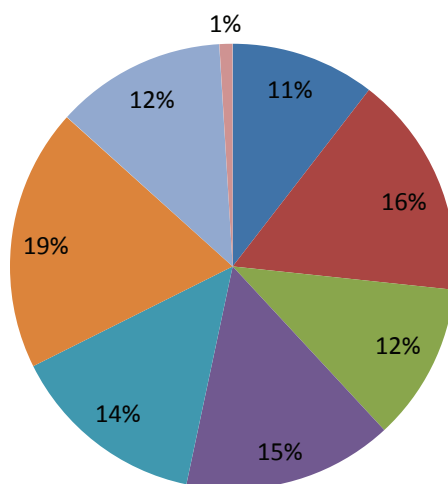
1 = special events 19  
 2 = tour 42  
 3 = accompany adults 14  
 4 = school trip 24  
 9999 = 7

8. Will you visit Old Salem again?



1 = yes, to tour 63  
 2 = yes, for events 24  
 3 = no 6  
 9999 = 13

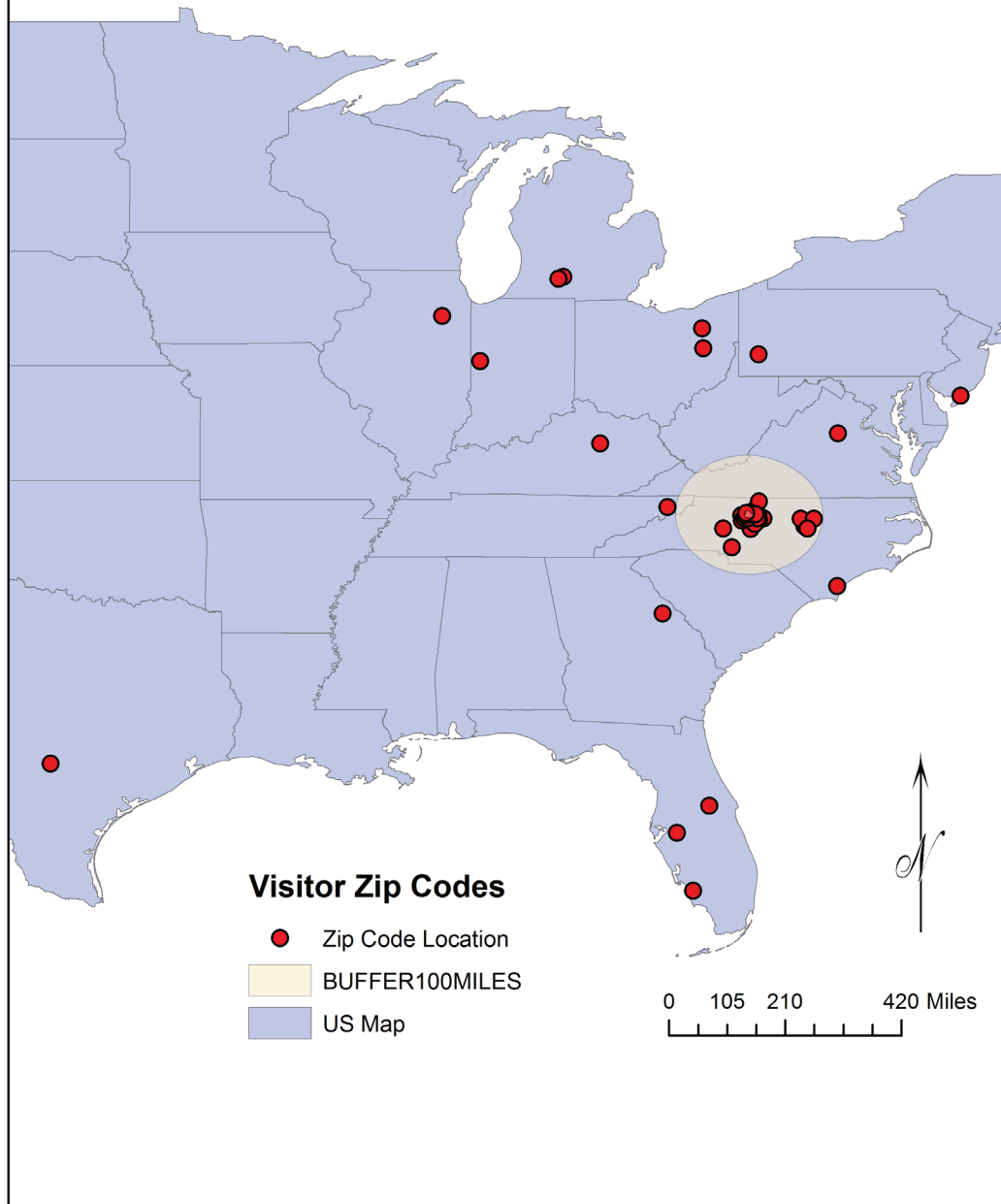
10. What is your age?



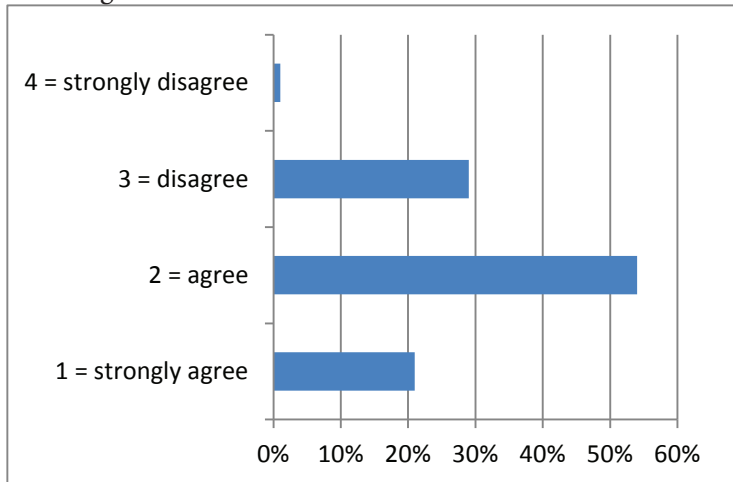
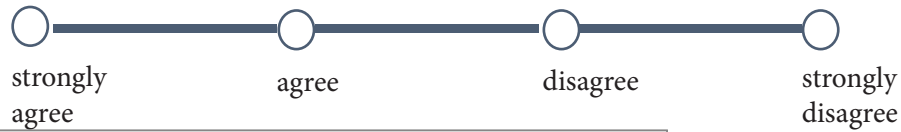
under 20 11  
 21 - 30 17  
 31-40 12  
 41-50 16  
 51-60 15  
 61-70 20  
 71-80 13  
 over 80 1  
 9999 1



## 4TH OF JULY VISITOR SURVEY



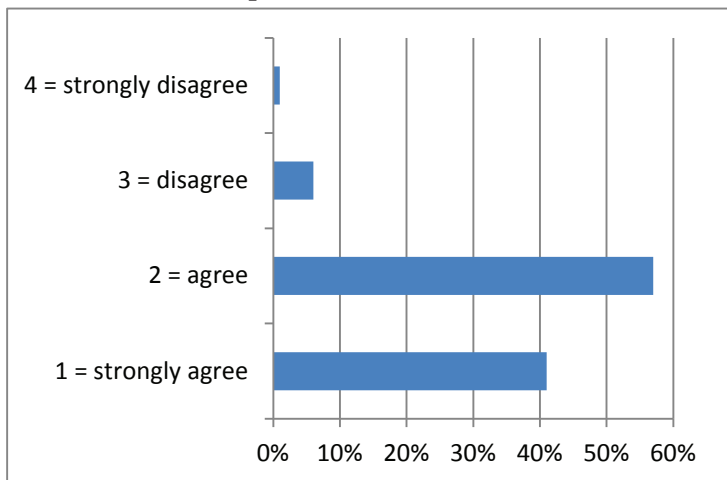
1. Everyone in the community knows about Old Salem Museums & Gardens.



*Raw Data Numbers*

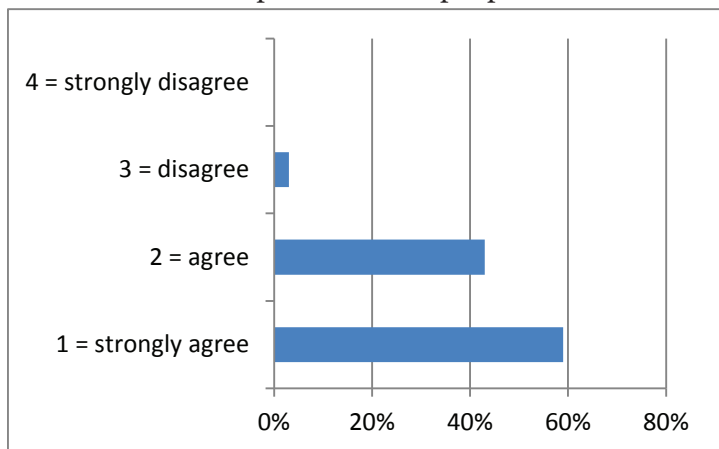
1 = strongly agree      21  
 2 = agree                54  
 3 = disagree            29  
 4 = strongly disagree   1  
 9999 = 1

2. Old Salem is important to me.



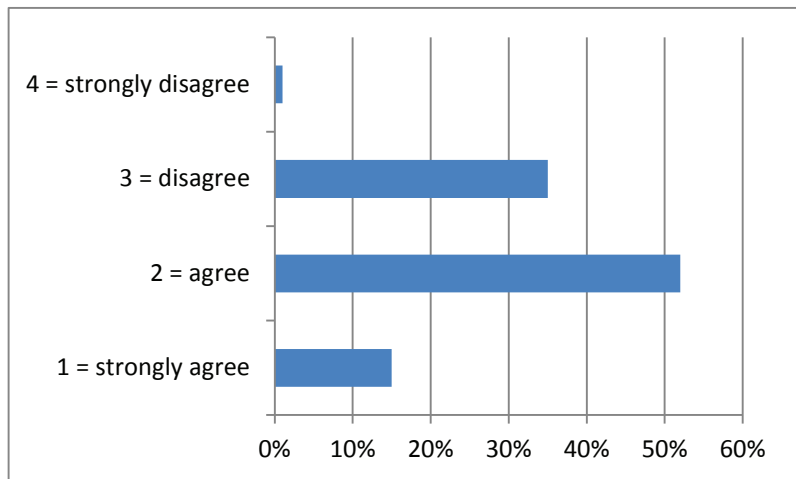
1 = strongly agree      41  
 2 = agree                57  
 3 = disagree            6  
 4 = strongly disagree   1  
 9999 = 1

3. Old Salem is important to the people of Winston-Salem.



1 = strongly agree      59  
 2 = agree                43  
 3 = disagree            3  
 4 = strongly disagree   0  
 9999 = 1

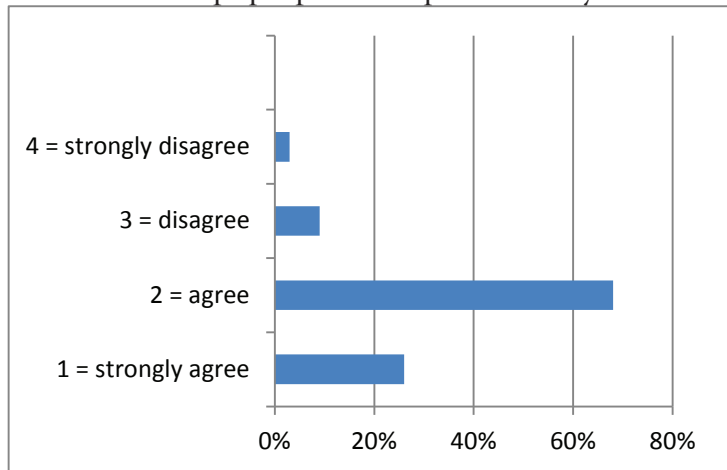
4. Old Salem is mainly for education.



*Raw Data Numbers*

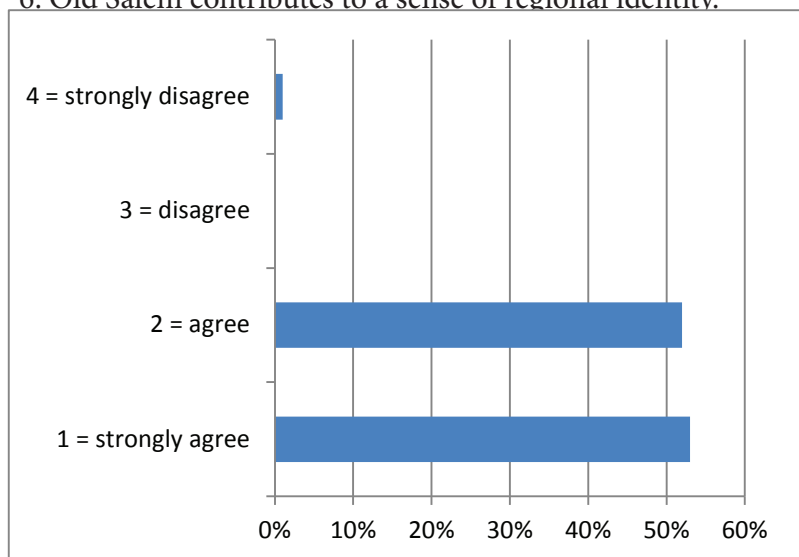
1 = strongly agree 15  
 2 = agree 52  
 3 = disagree 35  
 4 = strongly disagree 1  
 9999 = 3

5. Old Salem helps people develop community and social networks.



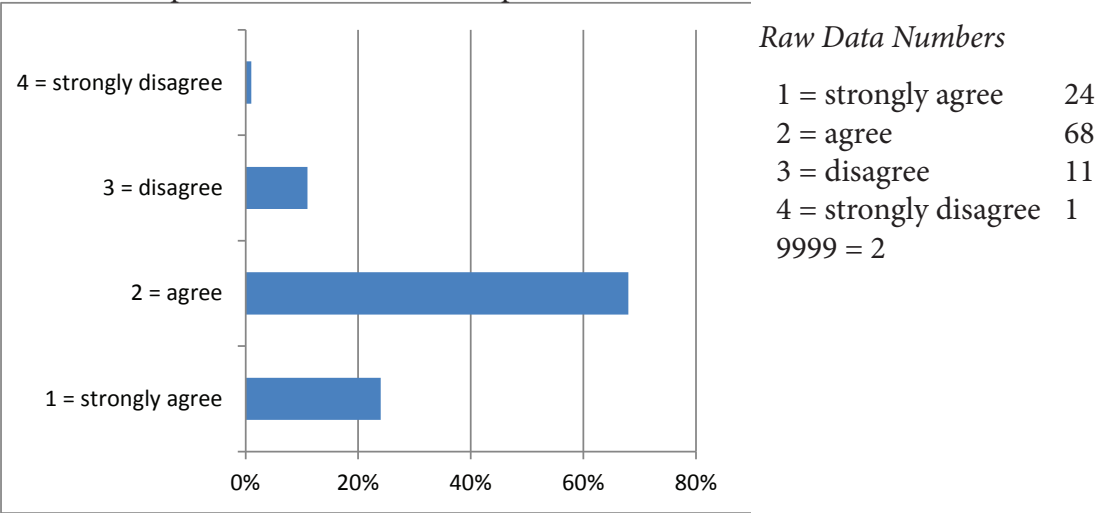
1 = strongly agree 26  
 2 = agree 68  
 3 = disagree 9  
 4 = strongly disagree 3

6. Old Salem contributes to a sense of regional identity.

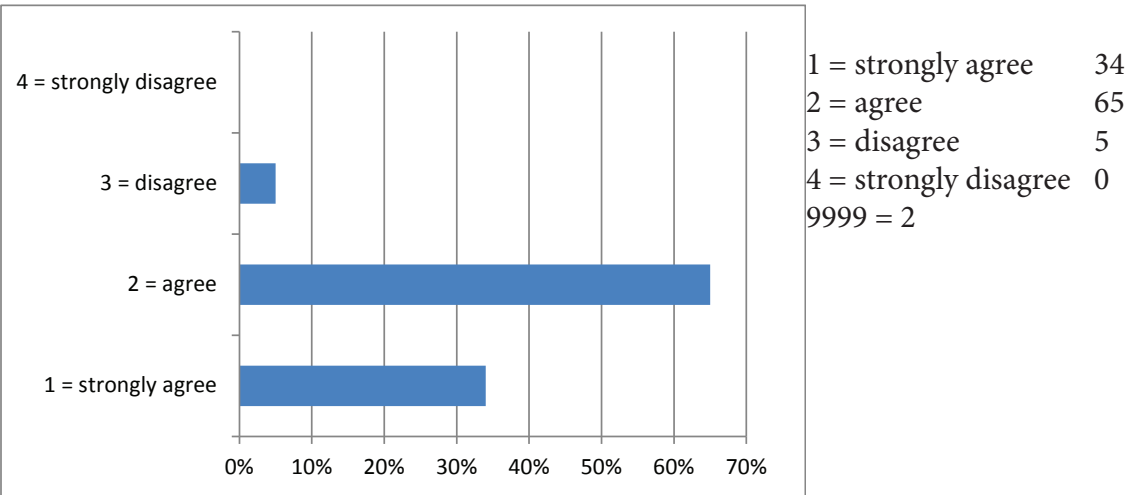


1 = strongly agree 53  
 2 = agree 52  
 3 = disagree 0  
 4 = strongly disagree 1

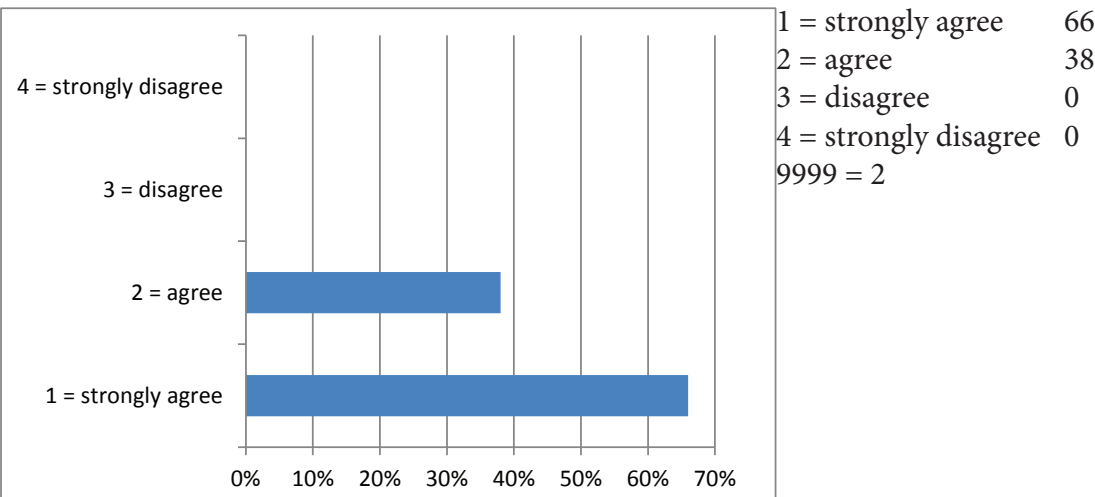
7. Old Salem promotes contact and cooperation across different cultures.



8. Old Salem promotes contact across different age groups.



9. Old Salem plays an important role in tourism for this region.



## Appendix B2: Residents Survey Results

### **How long have you lived in Old Salem?**

30 years

8 months

Second home...27 months

16 years

3 years

moved in 2000

31 years

3.5 years

14 years

15 years

10 years

40+

We've had the house almost 4 years

12 years

11 years this time

6 years

4 years

15 years

Four years

On and Off Forty Years

21 years

25 years

4 years

1 mo

4 1/2 months

### **Why did you choose to live here?**

I love the old buildings and the fact that

there is a whole town of restored 18th and 19th c. architecture. It is a truly unique neighborhood.

I was attracted by the historic nature of the village and by the green space.

Have been attending classes at MESDA since 1973....Advisory Board members for 7 years...chairman 2 years....currently trustee of Old Salem.....very involved in historic preservation for MANY YEARS

I work at Salem College

I teach at Salem Academy; aside from that, this is my very favorite part of town.

Started working in Group Tours in 1999. Old Salem had such a beautiful and peaceful feeling about it, I wanted to live here. When the first house to rent came up, I took it immediately. Have been grateful for the opportunity ever since.

Also enjoy looking up Main Street at the tall building and modern life and the sense of living in an earlier time in Old Salem.

"We liked the community and loved the house from the first moment we saw it. We leased it from the owner and shortly thereafter bought it.

Desired to ultimately retire in a historic area or city, where I have a passion to carry on the tradition. I considered other areas such as Williamsburg, Charleston SC, Savannah GA, however, none of those locations had the atmosphere and life quality that I observed in Old Salem

To be part of the beauty, charm and history of a small piece of Americana

Exquisite historic homes combined with the Salem College and the Church properties.

Married resident of Old Salem.

recently--wife's call

My husband wanted a home in an historic part of the country. After considering Williamsburg and Savannah, he chose Old Salem. I met & married him after he acquired the house. We hope to permanently relocate to Old Salem when he retires. It is very peaceful.

It is a nice area with quick access to places I enjoy or work.

I was raised in the house I am living in. After college in 1968 I moved away. When my mother died in 2000, my husband and I moved back into the family home rather than sell it.

It was one of several historic neighborhoods we were considering, and we fell in love with our house.

My wife wanted to

"1. Fell in love with our house, 2. Convenience of location to highways, airport, amenities, 3. Love old homes, 4. Love Williamsburg and saw Old Salem as similar but smaller"

Best neighborhood in Winston Salem

Third Generation. Nice area for historic preservation.

Beautiful place....both interested in history

I had lived in Winston Salem before and always loved the area as I love the history of it and the tranquility. I also have always had an interest in antiques.



"Historic structures were initial attraction, people we met , cultural and educational events at college, weather

Being able to use library and cafeteria at Salem College"

charming house and neighborhood, historical value, peaceful

We enjoy Old Salem so much that we want to test it out to see whether we want to spend our last days in Old Salem! Love it . . .

**What do you like about living here?**

The architecture and gardens -- texture and material from the 18th and 19th century. It is close to the heart of downtown yet very much a place of its owns.

Living in Old Salem is a wonderful blend of old and new, a working village that has adapted to changes across time, fused with a collegiate milieu.

Enjoy history, architecture, ambience of area.

beauty and character of the village. it feels like a small town.

Everything.

As well as my second answer I've always enjoyed walking down the street and seeing people I've know.

Growing up as a military kid, that just never happened."

"We love our house: it is compact and well designed for our life-style.

We also like the beauty of Salem and spend lots of time walking: we like the mix of residents, proximity to downtown and the NCSA, access to the Salem College library and the overall beauty of the village.

I like the shops, the homes, the planned activities for family and guests, and the blend of "private" vs. "public" spaces and homes.

Charm of an historic village; enjoyable social atmosphere of congenial people; close to shopping; availability of educational facilities: many cultural opportunities.

It's like a very small village filled with really intelligent people. We enjoy the events that Old Salem holds and seeing the school kids on their field trips.

My husband. Sidewalks and trees. Historic ambience. Historic atmosphere, leafy setting

"The peacefulness of the village and the graciousness of the people.

It is a satisfying feeling to be connected to history via the house and the village.

We love our house!

The gardens of Old Salem, public & private, are beautiful. Everywhere I look, I see signs of attentive care."

Moravian culture and the horticulture combined with the greenway that runs to salem lake and the ambience of the historic community.

It's home to me.

The neighbors. The neighborhood association is very active, and once the museum closes, there is a lot of "over the fence" and "thru the gate" visiting and socializing via dog-walking, etc.

Historic old buildings

"1. Wonderful neighbors/neighborhood, 2. Living in an historic home and neighborhood, and the associated charm of both, 3. The peace and beauty of the neighborhood in the evening when the museum is closed, 4. Convenience of location.

1. The people, 2. proximity to restaurants and downtown activities

The different activities that occur in the restoration thanks to Old Salem and the college.

"The friendly atmosphere, the quiet at the end of the day when the village closes and mornings are wonderful. Also the interchanges with the visitors are fun."

The diversity of the neighborhood and the fact that I live in a little slice of heaven.

Our neighbors, the weather, our house

don't know yet

Easy access by walking to EVERYTHING from libraries to banks, from ball games to parks, from band concerts (on the Square) to so many programs that one cannot possibly take them all in, from access to the arts to amazing restaurants, from friendly community to opportunities for volunteer service, from walking to church to going back in time (all the village displays/museums/activities/demonstrations . . .

**What do you dislike about living here?**

Ambient auto traffic.

I had considered buying property but I was worried that it would be too difficult to upgrade the living spaces.

Not anything of significance

no other children (I have four children)

Police cars go by way too fast.

No place is perfect. And for the pleasure of living in Old Salem, you just accept any problems that result from all the tourists. Fuss a little, shake your head and go on.

"Our house is rather dark with the small windows but we have addressed that with interior alterations. We know that there are tremendous financial challenges within Old Salem Museum and Gardens, but it seems that there is a spreading disneyfication with some of the extra activities to bring tourists here. Since we divide our time now and aren't here all the time, it is not a huge issue, but if we were I think it could change our opinion."

The outside maintenance of the town needs to be better kept. Sidewalks, streets, common areas like the square tend to have an appearance of intermittent upkeep.

"Partial historic atmosphere - auto traffic within the village seriously reduces the historic ""feel"" of the village. Lack of adequate security - frequent car break-ins, occasional muggings - seeming lack of security interest from Winston-Salem authorities as well as Old Salem Village Management. Lack of architectural continuity with new visitor center.

Needs more street lighting as a safety factor.

Too many trees cut down recently. Some of our neighbors.

A couple of neighbors

That I'm not there more often! Other than that, there is nothing I dislike about Old Salem.

There are no aspects that I dislike.

Nothing

misconceptions about historic preservation and the belief that the museum period structures are the only ones worth preserving

Heat, glare, being away from the ocean

"1. Lack of local and State support for maintenance of streets, sidewalks and public services, 2. Cars parked on the street in the historic district, 3. Slow bureaucracy (City and Old Salem) for approval of even minor changes to the property, eg removal of a dying tree, 4. High cost of maintenance and repairs on an historic house, 5. Until recently, lack of support for and cooperation with residents from Old Salem, 6. Noise from the nearby auto racing at Bowman Gray Stadium."

Lack of two-way communication

Lack of exterior upkeep of museum buildings

The boring social scene.

Not much I can think of

That some of the residents do not understand that we are here because Old Salem was restored and we have the privilege of living here. Old Salem and the tourists were here before we were and if that was not the situation we would not have the opportunity to live in this wonderful place. They need to understand that the tourists are what keep the neighborhood alive.

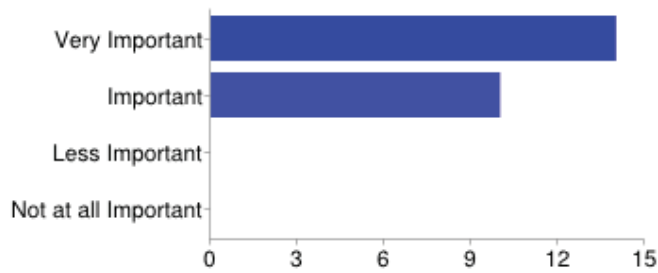
The poor communication among the stakeholders, with common mutual interests, of the Old Salem Historic District

parking needs to be addressed, keeping visitors in the designated lots, less curbside parking

The ONLY thing missing is a grocery store . . . but most of us have cars to use when necessary.

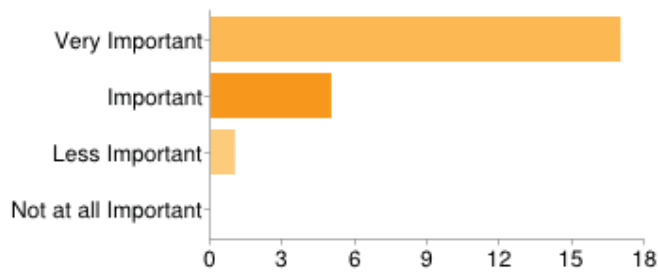
**How important are these features to you?**  
**- Scale of Buildings**

Very Important	<b>14</b>	50%
Important	<b>10</b>	36%
Less Important	<b>0</b>	0%
Not at all Important	<b>0</b>	0%



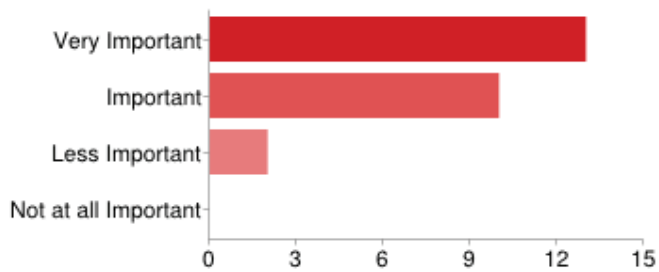
**How important are these features to you? - Style of Buildings**

Very Important	17	61%
Important	5	18%
Less Important	1	4%
Not at all Important	0	0%

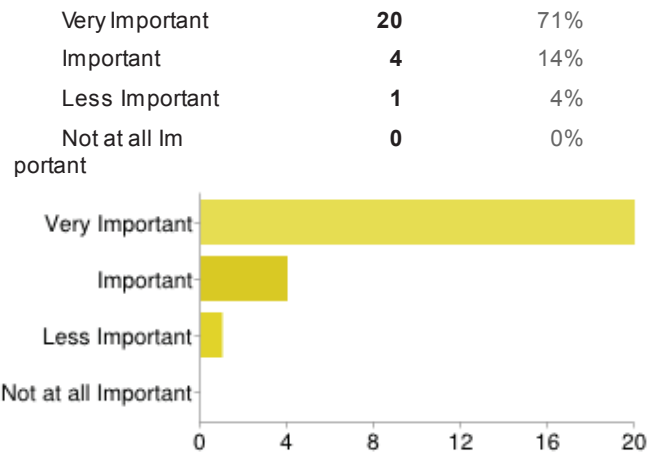


**How important are these features to you? - Brick and Stone Sidewalks**

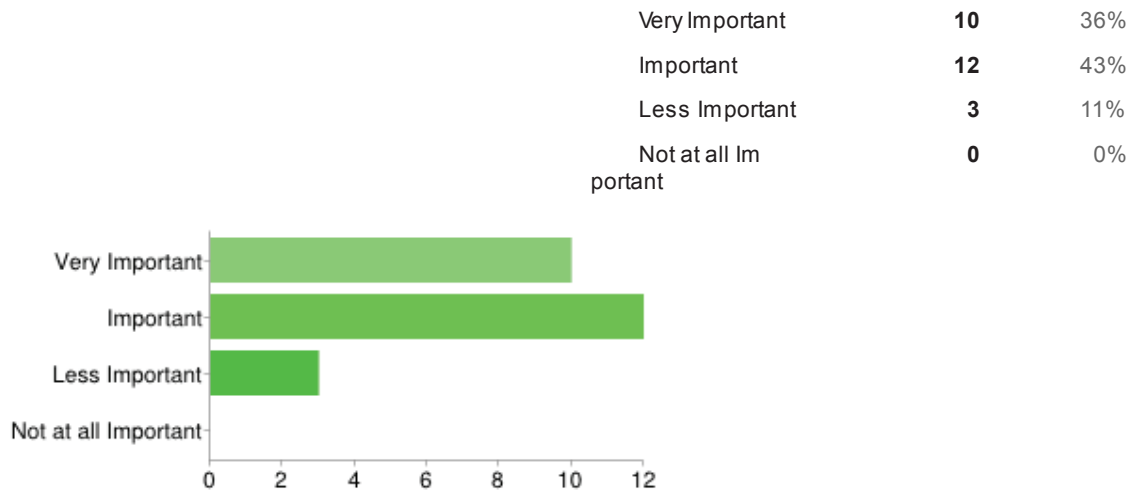
Very Important	13	46%
Important	10	36%
Less Important	2	7%
Not at all Important	0	0%



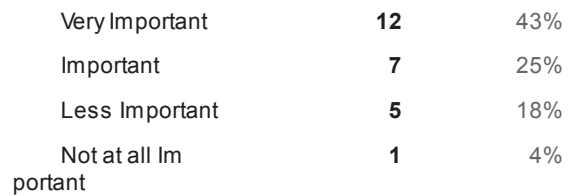
**How important are these features to you? - Gardens and Landscaping**

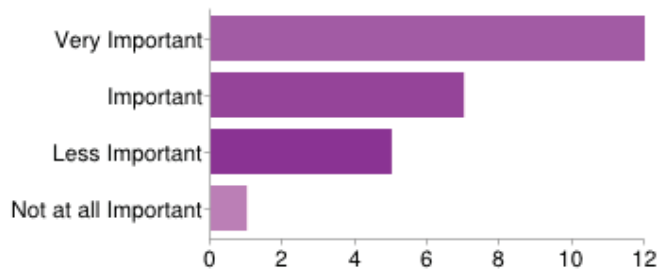


**How important are these features to you?  
- Public Visitation**



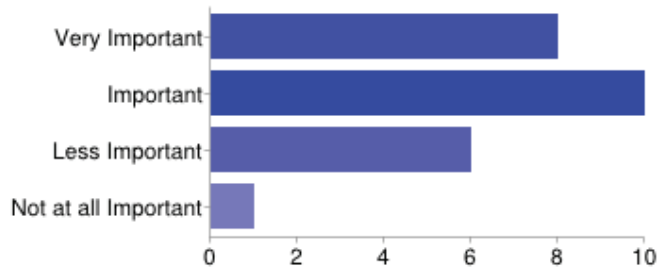
**How important are these features to you?  
- Arts and Cultural Events**





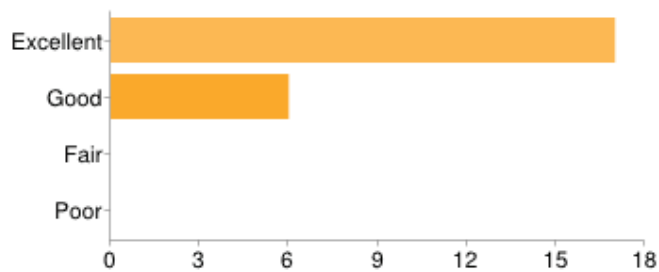
#### How important are these features to you? - Retail and Restaurant Amenities

Very Important	8	29%
Important	10	36%
Less Important	6	21%
Not at all Important	1	4%



#### How would you rate the quality of these features? - Scale of Buildings

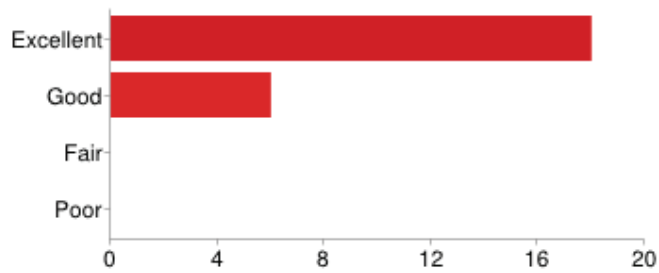
Excellent	17	61%
Good	6	21%
Fair	0	0%
Poor	0	0%



#### How would you rate the quality of these features? - Style of Buildings

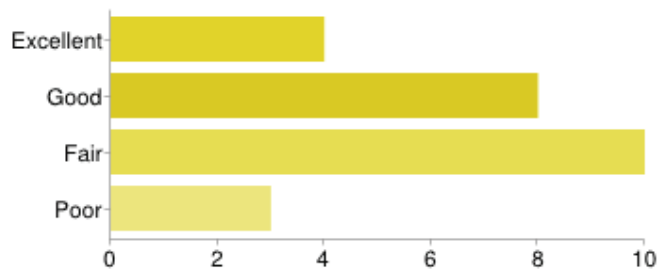
Excellent	18	64%
Good	6	21%
Fair	0	0%
Poor	0	0%





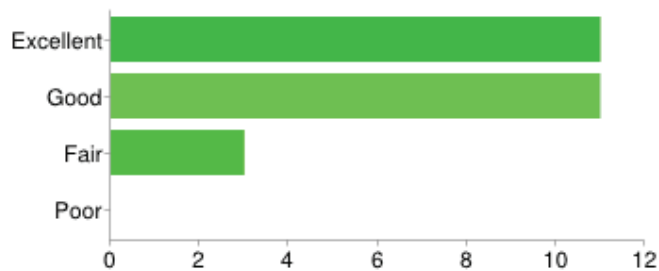
**How would you rate the quality of these features? - Brick and Stone Sidewalks**

Excellent	4	14%
Good	8	29%
Fair	10	36%
Poor	3	11%



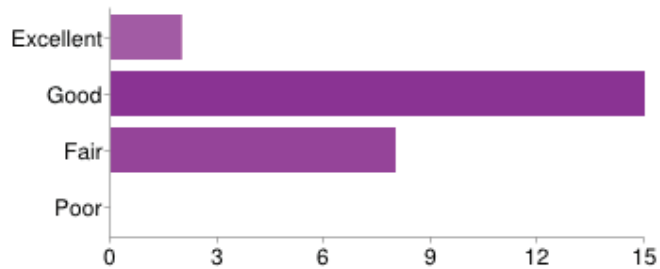
**How would you rate the quality of these features? - Gardens and Landscaping**

Excellent	11	39%
Good	11	39%
Fair	3	11%
Poor	0	0%



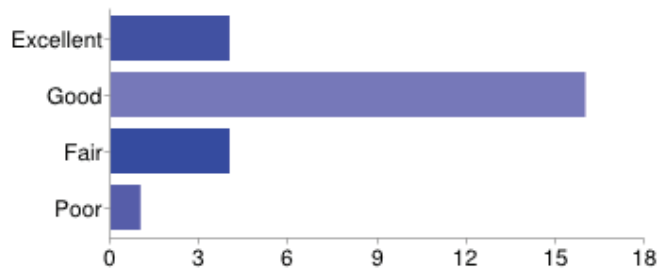
**How would you rate the quality of these features? - Public Visitation**

Excellent	<b>2</b>	7%
Good	<b>15</b>	54%
Fair	<b>8</b>	29%
Poor	<b>0</b>	0%



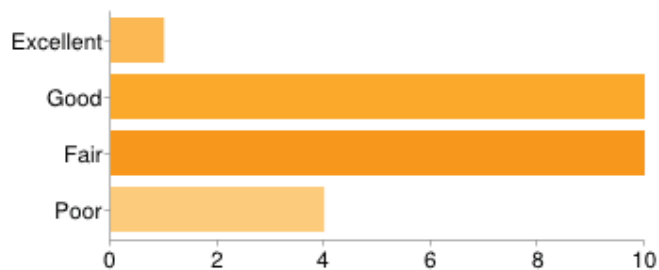
**How would you rate the quality of these features? - Arts and Cultural Events**

Excellent	<b>4</b>	14%
Good	<b>16</b>	57%
Fair	<b>4</b>	14%
Poor	<b>1</b>	4%



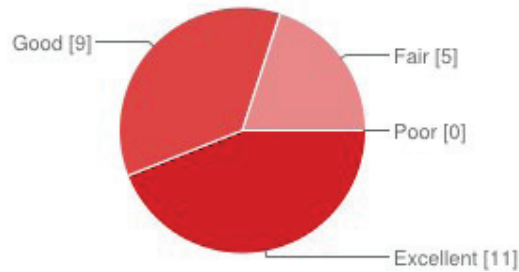
**How would you rate the quality of these features? - Retail and Restaurant Amenities**

Excellent	<b>1</b>	4%
Good	<b>10</b>	36%
Fair	<b>10</b>	36%
Poor	<b>4</b>	14%



**How would you rate the sense of community in the Old Salem Historic District**

Excellent	11	39%
Good	9	32%
Fair	5	18%
Poor	0	0%



**Besides the Old Salem Residents Association, are you involved with any other community groups in your neighborhood?**

no

Just museum study groups

"MESDA-- have been associated with it for 30 years, serving an internship during college at WFU, later worked as a guide, and more recently served on the Advisory Board. Old Salem--buy a membership; support retail and food establishments, attend programs. Home Church--attend concerts, occasionally do flower arrangements. Salem Academy and College--work there, do much in-kind work through flower arrangements for all occasions around campus"

I am definitely not a joiner or a big group person. However, that doesn't mean I don't appreciate the things available that tie people together. I think those things are extremely important in Old Salem. Probably could be more things that combine Old Salem staff and residents in a relaxed casual setting. That's just my guess.

Book group

Not at this point since I don't live there on a full time basis yet.

No

No, but my husband is.

no

no

No

I am involved in OSRA, Salem College board of visitors, co founder of the Wachovia Gardens, preserve historic Forsyth board member and sponsor a number of events that take place in the community or start here and progress elsewhere.

I am a member of Home Moravian Church. I am also an alumna of Salem Academy.

“Wine and Weed gardening/ social group, Ladies book club

Yes

Sorry too involved with my work.

I serve on the Education committee of the Historic Resources Commission and I was on the Landscape Committee which is now defunct.

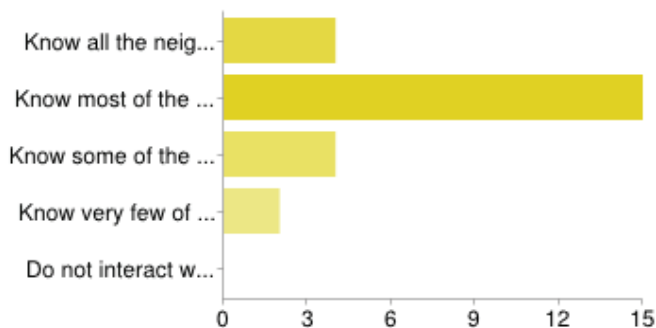
“Wine and Weed Book club, Marshall society, New benefactors, NC 26th regiment, Dinner group”

Preserve Historic Forsyth

“Home Moravian Church (regular visits to services/special events. Frederic William Marshall Society (attend programs/concerts/special events). Volunteer some with Wine and Weed and the Moravian garden behind Below H0use (for donations to those who need it)

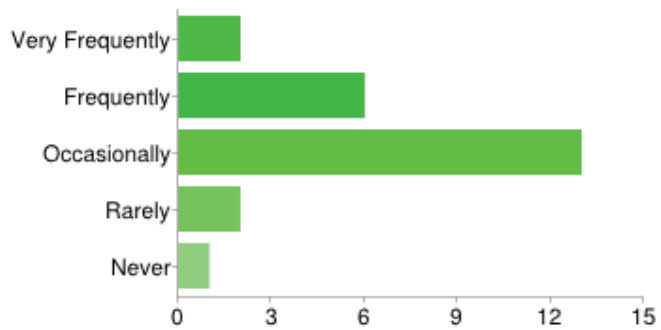
**How many of your neighbors do you know?**

Know all the neighbors	<b>4</b>	14%
Know most of the neighbors	<b>15</b>	54%
Know some of the neighbors	<b>4</b>	14%
Know very few of the neighbors	<b>2</b>	7%
Do not interact with the neighbors	<b>0</b>	0%



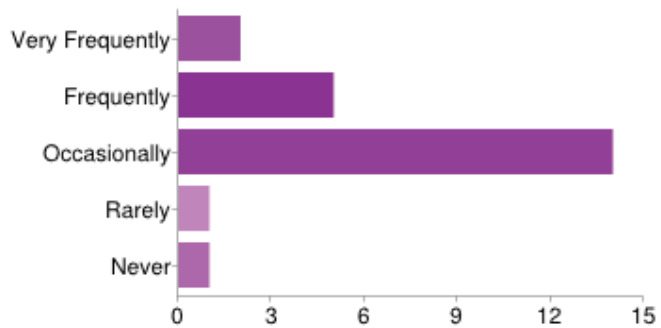
**How often do you help out your neighbors?**

Very Frequently	<b>2</b>	7%
Frequently	<b>6</b>	21%
Occasionally	<b>13</b>	46%
Rarely	<b>2</b>	7%
Never	<b>1</b>	4%



**How often do your neighbors help you?**

Very Frequently	2	7%
Frequently	5	18%
Occasionally	14	50%
Rarely	1	4%
Never	1	4%

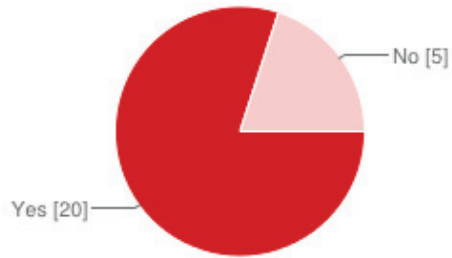


**How often do you attend events in the neighborhood?**

Very Frequently	7	25%
Frequently	8	29%
Occasionally	8	29%
Rarely	1	4%
Never	1	4%

**Do you volunteer at Old Salem Museums & Gardens?**

Yes	5	18%	No	20	71%
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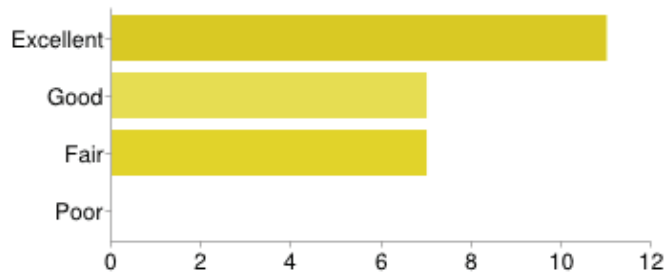
#### Are you a member of Old Salem Museums & Gardens

Yes 20 71% No 5 18%

How would you rate the communication between the residents of the Old Salem Historic District and... - Old

#### Salem Museums & Gardens

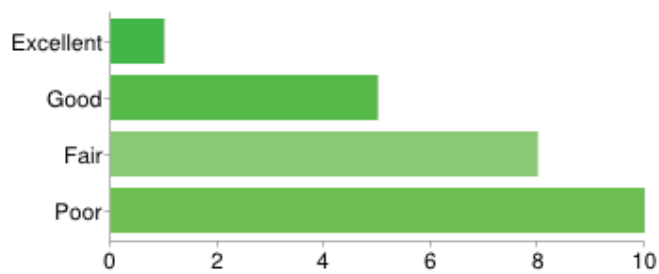
Excellent	11	39%
Good	7	25%
Fair	7	25%



How would you rate the communication between the residents of the Old Salem Historic District and... - Home

#### Moravian Church/Salem Congregation

Excellent	1	4%
Good	5	18%
Fair	8	29%
Poor	10	36%

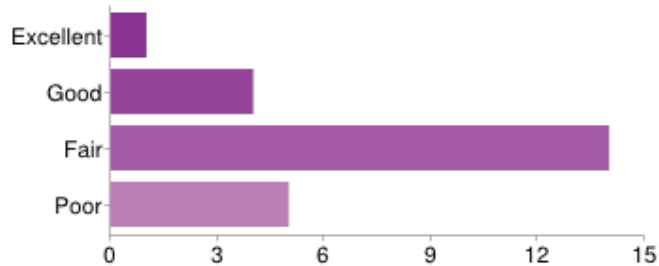




How would you rate the communication between the residents of the Old Salem Historic District and...  
- Salem

**Academy and College**

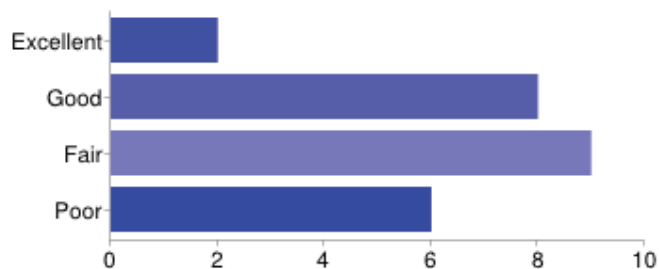
Excellent	1	4%
Good	4	14%
Fair	14	50%
Poor	5	18%



How would you rate the communication between the residents of the Old Salem Historic District and...  
- City of

**Winston-Salem Municipal Government**

Excellent	2	7%
Good	8	29%
Fair	9	32%
Poor	6	21%



**What changes would most improve this neighborhood?**

less traffic and parking on street. Improve sidewalks and street.

More frequent and more informative communication. Access to the tennis courts. More venues to get to know neighbors.

City being more attentive to condition of walkways etc

More collegiality between town/gown/church. It appears more adversarial than it should be. Collegiality needs to exist at the top of the scale.

"#1 - streets and sidewalks, #2 - building repairs, #3 - retail - more craftsmen work and made in US"

"Somehow improve the sidewalks, pay attention to the streets, be careful about the scheduling of groups that will overpower the historic nature of the community (we are not a theme park)."

Better upkeep and investment in maintenance of the general area. Working with the "private" residence, to collaborate on upkeep of common areas, including shared properties (ie, property lines, fences, parking space etc).

No automobile traffic in the village; conformity of non covenant and deed properties to historic standards (Moravian Church homes and Salem College homes); frequent historical reenactments; more period costumes for all OSV workers

Good Lighting! More trees and remove non-conforming features and buildings

Not sure if changes are needed. Consistency in excellence will continue to deliver desired results.

Better interaction between the four major institutions and the residents and better joint planning would improve Salem. Better joint coordination between the four major groups and the city especially as it relates to the technology park, development on Marshall and the Gateway and the Business 40 and Salem Creek corridors. Better Sound and Light planning with trees along Salem Avenue and Business 40 is a important issue being overlooked. There needs to be a more effective traffic and parking plan in regards to the College and Academy within and outside the historic district as it is currently configured.

More places for tourists to eat. No parking on streets in Historic District.

maintenance of Old Salem Museum buildings. The one on Salt street is embarrassing!

"1. Street and sidewalk maintenance, 2. No cars parked on the street, 3. Better exterior maintenance of buildings and fences owned by Old Salem, 4. Continued improvement in communication and support of resident property owners from Old Salem, 5. Local government recognition of what an extraordinary asset Old Salem is to the community."

"Exterior Repair and paint of exterior museum buildings. The building on Salt Street is an eyesore.

Planned street tree replacement "

Perhaps a younger generation and better real estate market to attract families. There is only one family with children here.

Too many homes are now on the market. "

To have a better understanding of what we are all working toward. Those of us that live here, should want Old Salem to be most successful as it truly affects where we live. We just need better communication between all of the entities, not just a select few.

"Enforcement of the leash law, Availability of Doggie bags

Improved lighting for safety at night, Street closure during major events widened and enforced

Old Salem employees and volunteers parking in designated employee lots rather than on public streets. Exterior maintenance of museum buildings, concerted effort to keep events and crowds from interfering with other continuing activities

Other than local newspaper, information on the internet would help me to know what's going on.

## Appendix B3: Farmers Market Survey Results

The purpose of this survey is to gauge the economic productivity of the Old Salem Cobblestone Farmers Market. Your participation in this assessment will provide valuable information to Old Salem Museum and Gardens about the impact of the organization on Winston-Salem, North Carolina.

The survey will take approximately 3 minutes.

Your answers will be kept confidential. Your answers will be used strictly as research for measuring the economic impact of the Old Salem Cobblestone Farmers Market and contribute to an assessment of the overall economic impact of Old Salem Museums and Gardens.



PAGE: 2

1. Please provide your farm/vendor/company name

[Download](#)

Response

Count

[Hide Responses](#)

6

**Responses (6)**

**Text Analysis**

**My Categories (0)**

Showing 6 text responses:

No responses selected

Plum Granny Farm

8/1/2012 3:51 PM [View Responses](#)

Sanders Ridge

7/24/2012 9:28 PM [View Responses](#)

Moser Manor Farm

7/24/2012 7:28 PM [View Responses](#)

Beta Verde, LLC

7/23/2012 2:45 AM [View Responses](#)

Yellow Wolf Farm

7/13/2012 9:10 AM [View Responses](#)

Rail Fence Farm

7/11/2012 4:56 PM [View Responses](#)

2. Please provide your zipcode		Download
		Response Count
		Hide Responses 6
<div> Responses (6) Text Analysis My Categories (0) </div>		
Showing 6 text responses		No responses selected
27021	8/1/2012 3:51 PM	<a href="#">View Responses</a>
27011	7/24/2012 9:28 PM	<a href="#">View Responses</a>
27021	7/24/2012 7:28 PM	<a href="#">View Responses</a>
27106	7/23/2012 2:45 AM	<a href="#">View Responses</a>
28634	7/13/2012 9:10 AM	<a href="#">View Responses</a>
27284	7/11/2012 4:56 PM	<a href="#">View Responses</a>

3. Is the Old Salem Cobblestone Farmers Market economically profitable for you?		Create Chart	Download
		Response Percent	Response Count
Yes	<div></div>	100.0%	6
No		0.0%	0

4. In terms of your proceeds, how would you rate the Old Salem Cobblestone Farmers Market?		Create Chart	Download
		Response Percent	Response Count
Excellent	<div></div>	100.0%	6
Good		0.0%	0
Fair		0.0%	0
Poor		0.0%	0

5. In terms of economic viability for you, how does the Old Salem Cobblestone Farmers Market compare to other farmers markets?

[Create Chart](#) [Download](#)

	Response Percent	Response Count
Above-average	100.0%	6
Average	0.0%	0
Below-average	0.0%	0
This is the only farmers market I participate in	0.0%	0



## Appendix C1: National Park Service PEIM

### Economic and Tax Impacts of Historic Preservation Activity on North Carolina. Run name / report type: Old Salem / All Included.

8/16/2012

	Economic Component			
	Output (000 \$)	Employment (jobs)	Income (000\$)	Gross State Product (000\$)
<b>I. TOTAL EFFECTS (Direct and Indirect/Induced)*</b>				
<b>Private</b>				
1. Agriculture	17.0	0	1.5	2.5
2. Agri. Serv., Forestry, & Fish	11.1	0	5.6	8.4
3. Mining	1.4	0	0.4	0.9
4. Construction	207.2	1	28.3	65.8
5. Manufacturing	1,019.1	8	282.3	428.4
6. Transport. & Public Utilities	549.3	4	168.1	266.9
7. Wholesale	227.9	2	92.7	96.0
8. Retail Trade	713.0	17	261.7	392.9
9. Finance, Ins., & Real Estate	1,249.7	8	333.5	912.8
10. Services	8,704.0	97	3,199.9	3,029.7
Private Subtotal	12,699.9	137	4,373.9	5,204.1
<b>Public</b>				
11. Government	64.3	1	19.3	29.6
Total Effects (Private and Public)	12,764.2	138	4,393.2	5,233.8
<b>II. DISTRIBUTION OF EFFECTS/MULTIPLIER</b>				
1. Direct Effects	7,301.7	76	2,608.2	2,355.0
2. Indirect and Induced Effects	5,462.5	62	1,785.1	2,878.8
3. Total Effects	12,764.2	138	4,393.2	5,233.8
4. Multipliers (3/1)	1.748	1.813	1.684	2.222
<b>III. COMPOSITION OF GROSS STATE PRODUCT</b>				
1. Wages--Net of Taxes				6,942.9
2. Taxes				776.9
a. Local				122.1
b. State				114.7
c. Federal				540.2
General				69.2
Social Security				471.0
3. Profits, dividends, rents, and other				-2,486.1
4. Total Gross State Product (1+2+3)				5,233.8
<b>IV. TAX ACCOUNTS</b>				
	<b>Business</b>	<b>Household</b>	<b>Total</b>	
1. Income --Net of Taxes	6,942.9	4,393.2	-----	
2. Taxes	776.9	894.1	1,671.0	
a. Local	122.1	66.3	188.4	
b. State	114.7	150.6	265.3	
c. Federal	540.2	677.1	1,217.3	
General	69.2	677.1	746.3	
Social Security	471.0	0.0	471.0	
<b>EFFECTS PER MILLION DOLLARS OF INITIAL EXPENDITURE</b>				
Employment (Jobs)				17.2
Income				549,145
State Taxes				33,163
Local Taxes				23,552
Gross State Product				654,207
<b>INITIAL EXPENDITURE IN DOLLARS</b>				8,000,147

Note: Detail may not sum to totals due to rounding.

\*Terms:

Direct Effects --the proportion of direct spending on goods and services produced in the specified region.

Indirect Effects--the value of goods and services needed to support the provision of those direct economic effects.

Induced Effects--the value of goods and services needed by households that provide the direct and indirect labor.

## Appendix C2: Americans for the Arts Prosperity Calculator



### INFORMATION

#### STEP 1: POPULATION

POPULATION of your community:

100,000 to 249,999 ▼

#### STEP 2: TOTAL EXPENSES

Your Organization's TOTAL EXPENSES (please do not use commas):

\$ 8000147

#### STEP 3: TOTAL ATTENDANCE (OPTIONAL)

TOTAL ATTENDANCE to your organization's arts events (again, do not use commas):

87596

CALCULATE

Reset

### TOTAL ECONOMIC IMPACT OF:

	Total Expenditures	FTE Jobs	Household Income	Local Government Revenue	State Government Revenue
Nonprofit Arts and Culture Organizations:	\$8,000,147	294.4	\$6,596,681	\$306,006	\$359,287
Nonprofit Arts and Culture Audiences:	\$1,670,456	47.4	\$987,791	\$86,112	\$95,032
Total Industry Impact: (The Sum of Organizations and Audiences)	\$9,670,603	341.8	\$7,584,472	\$392,118	\$454,319

## Appendix C3: Association of Independent Museums Economic Impact Analysis

### Level 1 Tourism Impacts

1. Total Number of Visitors 87,560

2. Proportion Local (44%) 38,526  
 Adults 48,431  
 Children 39,165

3. Gross Impacts  
 spend by local visitor 18.91  
 spend by non-local visitor 63.79  
 average spent 23.37

Gross Visitor Impacts	Number	Amount	Total Impacts
Local visitors 3	8,526.00	\$18.91	\$728,526.66
non-local	49,034.00	\$63.79	\$3,127,878.86
<b>Gross Visitor Impacts</b>			<b>\$3,856,405.52</b>

### Level 2 Employment Impacts

1. Number of Full Time Equivalent Employees 141  
 deadweight 0.25

2. Proportion Non-Local (%) 23  
 leakage ratio 0.23

3. Displacement ratio (%) 0.3  
 multiplier 1.2

**Total Direct, indirect, and induced employment value 68.3991**

### Level 3 Impacts of Spend on Goods and Services

1. Amount spent on goods/services \$6,708,368.89

deadweight 0.25

2. Proportion non-local % 0.6

leakage 0.4

3. Displacement ratio % 0.375

4. Multiplier 1.2 1.2

**total direct, indirect induced spend \$1,207,506.40**

## Appendix D: Propose Utilitarian QOL Framework

Type	Indicator
<b>Education</b>	Elementary Education Middle School Education Secondary Education Support for Lifelong Learning Preservation Staff and Resources
<b>Community</b>	Social Capital Civic – Museum Partnerships Regional Identity Public Awareness Working with Government Agencies Membership Local Versus Non-Local Local Amenities
<b>Economic</b>	Property Values Business Partnerships Sponsored Events Job Creation Tourism Impacts
<b>Physical Character</b>	Historic Fabric Landmarking Design Guidelines Restoration and Property Reinvestment Walkability Gardens and Landscaping Geography and Connectivity

### Educational Indicators

*Elementary Education* – What programs are available to engage elementary school age children? Indicates the museum level of commitment to education.

*Middle School Education* – What programs are available to engage middle school age children? Indicates the museum level of commitment to education.

*Secondary Education* – What programs are available to engage secondary educational needs? Indicates the museum level of commitment to education.

*Support for Lifelong Learning* – What programs are available to encourage lifelong learning? Indicates the museum level of commitment to education.

*Preservation Staff and Resources* – Does the museum have staff dedicated to historic preservation and sharing knowledge/resources? Is this required by staff contracts? Demonstrates the museum staff's commitment to historic preservation in the community.

### Community Indicators

*Social Capital* - Measures the value of horizontal and vertical social interactions, empowerment, and inclusion efforts. Indicates the

museum's impact on social capital, and extent to which the museum inspires social capital.

*Civic – Museum Partnerships* - In what ways, when and how often is the museum used by civic groups, working with local government, increasing public awareness about the museum? Indicates how much the local community values the presence of the historic site and museum.

*Regional Identity* – Do citizens have meaningful connections to the museum? Measures how much influence the presence of the museum has in forming significant connections to the public.

*Public Awareness* – Does the public remain informed about what the museum is, provides, and events going on? Indicates level of effective public communication, response, and willingness of the museum to collaborate.

*Working with Government Agencies* – How does the museum work with local officials? Indicates the museum's willingness to collaborate with local officials to serve community goals in historic preservation.

*Local Amenities* – What does the museum provide and what sorts of amenities are supported in the historic district? Indicates incorporation of historic preservation in local economic development activities. Measures the museum's willingness to engage in small business incubation.

#### Economic Indicators

*Property Values* – Is there a real estate premium for properties nearby the museum? Indicates demand of authentic historic real estate and proximity draw of the museum.

*Business Partnerships* – With whom does the museum do business? Determines breadth of business transactions, the more local the better.

*Sponsored Events* – How often does the museum sponsor events for the community at large? Indicates demand for special events and willingness to be more than a museum.

*Job Creation* – How many people does the museum employ? Measures employment standards, and induced jobs.

*Tourism Impacts* – How much do heritage tourists contribute to the local economy? Measures the impact of visitors on the local economy.

#### Physical Character Indicators

*Historic Fabric* – Characterize and quantify the historic resources in the neighborhood. Indicates level of integrity of the historic neighborhood and historic resources left.

*Landmarking* – How many of the buildings in the neighborhood are

landmarked? Measures the public value of historic buildings.

*Design Guidelines* – What design controls are available? Indicates level of enforcement and response.

*Restoration and Property Reinvestment* – How much restoration occurs in the neighborhood? Measures public investment in the historic district.

*Walkability* – What is the scale of the neighborhood? Measures pedestrian scale of the neighborhood and functional use by the public.

*Gardens and Landscaping* – Characterize the garden and landscaping environment in the neighborhood.

*Geography and Connectivity* – Where is the museum located in relation to other amenities? Indicates past, present, and future functions of the space.



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